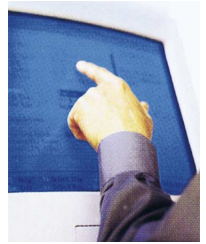


Aloha QuickService

User's Guide



Version 5.3

Aloha®

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Introduction

What is QuickService?

QuickService is software specifically written for the modern, fast-paced restaurant business. QuickService supports the single restaurant environment, but also handles the multiple-store corporate chain very well. QuickService incorporates the redundancy necessary to ensure that no data is lost when a single computer fails, or when electrical power fails in the restaurant.

QuickService also incorporates the ease of use and completely integrated features necessary to give you the freedom to manage your restaurant business instead of managing your software. Some of the features available in QuickService are:

Intuitive touch-screen interface — Touch the screen to place orders, run reports, and perform many other vital tasks directly from the Front-of-House terminal.

Built-in redundancy — If a terminal fails, its sales information resides in duplicate on the file server. If the file server fails, one of the order entry terminals takes over its functions until it is returned to service.

Customizable screens and screen flow — Design function and order entry screens that support and facilitate your unique type of restaurant. Create unique screens that direct your employees quickly and easily through the sales and tendering process, and that provide easy access to employee functions, such as time and funds accountability.



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Simple check or item-splitting — Guest checks are simple to work with to add, delete, and change items.

Comprehensive reporting — Complete information is available about sales, inventory, profit, replenishment, and more.

Menu management — Add, edit, or delete items from the menu quickly and easily.

Multiple graphical user interfaces — Define different interfaces for different labor categories, to present appropriate menus to employees working in different areas of the restaurant. Servers who are working the front counter, the drive-through window, and the pizza counter can all work from order entry screens that are customized to suit their functions.

Server performance measurements — Distinguish easily those employees who are hustling for you from those who are not.

Built-in security — Easily configure access to provide the right access to the right employees.

Multiple job codes and per-employee access levels — Establish two or more jobs for each employee, with access levels to match each job code.

Job code-specific menu assignments — Define specific menus for two or more different types of servers, such as bartenders, cocktail waitresses, fine dining waiters and waitresses, pizza servers, and snack bar servers.

Modular design — Incorporates several modules for reporting, scheduling employees, and numerous other functions.

What's New?

This section describes new features and functions made available to you in each new release, with the oldest version being v5.2.8. If you are viewing this manual in PDF format, each new reference contains a hyperlink. Click this hyperlink to move to the page containing the information.

Aloha QuickService v5.3

We added the following enhancements in the Aloha QuickService User's Guide for version 5.3.

Regrinding Sub-directories

We added the Regrinding Sub-directories function to the manual to support non-SuperSite environments. Refer to "Regrind Subdirectories" on page 10-23 for more information.

Defining Default Item Weight for Guest Counting

You can now define the default weight value of an item when you count guests by category. For example, you can set the guest count weight of an item named 'Fajitas for Two' so that it increases the guest count by two when a customer orders it. This check box works in conjunction with the 'Use Entrees for Guest Counts' check box and the 'Category' selected in Maintenance > Store Settings > Order Entry group on the Guest Counts subtab. The default guest count weight is one. Refer to "Item Weight Inset" on page 5-31 for more information.

Enabling Bar Code Scanning for Promotions

The Aloha QuickService software has returned the ability to scan promotions using bar codes. This assists you with the lookup of the promotion, therefore, allowing you to apply the promotion to the guest check very quickly. Refer to "Bar Code Range Values" on page 6-21 for more information.

Enabling Advance Orders

You can now enable the system to place orders in advance and specify the time to prepare the order. This accommodates environments that accept orders now to be prepared and picked up later. In the first phase of this feature, you must place and prepare orders in the same business day. In subsequent releases, the Advance Orders feature will allow advance orders for future days. Refer to the Aloha QuickService Special Features Guide for full documentation on Advance Orders. Also refer to the “Advance Orders Subtab” on page 3-11, “Enter Advance Order” on page 5-113, and “Manage Advance Orders” on page 5-114 for more information.

Enabling Sub-Orders

You can now enable the system to divide the guest check into sub-orders as you enter the order, and communicate to the kitchen how to properly package the items. This accommodates drive-thru environments where several guests in a car want to see their separate totals and receive separate bags. Guests must pay all at once as one payment rather than separately. If the guests want to pay separately, we recommend not creating sub-orders and entering the orders as separate checks. To use this feature, you must also set up tray chit printing. Refer to the Aloha QuickService Special Features Guide for full documentation on Sub-Orders. Also refer to “Next Seat” on page 5-118, “Use Next Seat for Guest Counts” on page 3-6, and “Tray Chits Inset” on page 3-76 for more information.

Printing Check Stubs

You can now use the Print Check Stub feature to support QuickService environments where a guest orders as they walk into the restaurant. The person taking the order enters the items into the system, without ordering them, and a check stub prints for the guest to take with them to the table. The guest will then hand the check stub to the server. You can define what prints on the guest check and when the check stub prints. Refer to “Print Check Stub” on page 3-57 for more information.

Aloha QuickService v.5.2.8

We added the following enhancements in the Aloha QuickService User's Guide for version 5.2.8.

Supporting Up to 999 Taxes

You can now define up to 999 taxes in Maintenance > Menu > Taxes. This greatly helps installations for SuperSite and CDM environments, which commonly need to define and use a multitude of tax records. Refer to "Taxes" on page 5-154 for more information.

Enforcing Table Tent Sequence

When using the Table Tent feature, you can now retain the original numbering sequence as defined as the minimum and maximum tent numbers. If enabled, the system keeps the same numbering sequence and offers you the next table number, which you can accept or touch 'Try Again' to move to the next number in sequence. You can not manually enter a table tent number. Refer to "Table Tents Inset" on page 3-74 for more information.

Suppressing Voucher Printing for Non-Cash Tenders

You can now specify whether an individual non-cash tender prints a voucher when you apply a payment. Select this option when you do not need a signed voucher from the guest, such as meal discount cards. Refer to "Do Not Print Vouchers" on page 6-10 for more information.

Supporting Russian Cyrillic Printing

The Aloha system now supports the Cyrillic (Russian) code page needed to print certain international monetary symbols. Cyrillic joins the Euro in the supported list of code pages by the Aloha system. Refer to "Code Page" on page 8-29 for instructions and more information.

Clarified Check Reduction Qualifications

We have clarified existing functionality in regards to qualifying items for a Check Reduction promotion. If you select 'Qualify' with a qualifying category, all items within the category are eligible for the promotion. If you clear 'Qualify' with a qualifying category, all items excluded from the category are eligible for the promotion. Refer to "Qualify" on page 6-33 for more information.

Clarified Pricing Hierarchy

We have clarified the order of the Pricing Hierarchy for the Aloha system. Refer to "Pricing Methods and Pricing Hierarchy" on page 5-5 for more information.

How This Book is Organized

This book is designed to help you familiarize yourself quickly with Aloha QuickService. It is organized as follows:

Chapter 1: Aloha Manager

This chapter discusses functions necessary to establish a foundation for understanding the Aloha system. Discussions about security, customization, and modifying the appearance of Aloha Manager are included.

Chapter 2: Functions

This chapter discusses the functions used to edit deposits and create employee schedules. In addition, third-party accounting applications are accessed through Functions.

Chapter 3: Store Settings

This chapter discusses the Store Settings functions within Aloha Manager. You will gain an understanding of each store settings group, the available functionality for each group, and how to create customized settings for your store.

Chapter 4: Labor Maintenance Functions

This chapter explains how to create and maintain employee files, job codes, access levels, and other labor related settings.

Chapter 5: Menu Maintenance Functions

This chapter outlines creating menu panels and function buttons, setting up menus, and assigning menu items to function buttons. Topics include Panel Editor, items, taxes, modifiers, and categories, and how they interact with the menu system.

Chapter 6: Payments Maintenance Functions

This chapter discusses creating and setting up payment tenders, promotions, comps, gift certificates, house accounts, and foreign currencies.

Chapter 7: System Maintenance Functions

This chapter discusses the features available in Aloha Manager that relate to adding and creating events, order modes, revenue centers, and tables, and defining void reasons, no sale reasons and petty cash accounts.

Chapter 8: Hardware Maintenance Functions

This chapter discusses the setup and configuration of hardware that is typically attached to the Aloha system, such as terminals, cash drawers, printers, and remote display system devices.

Chapter 9: Messages

This chapter discusses the features available on the Messages menu. These are used to generate messages for communicating with individual employees, the restaurant staff, or the guests.

Chapter 10: Utilities

This chapter discusses the Aloha system features that deal with data verification, controlling the Front-of-House, database upgrade, handling data, and the End-of-Day functions.

Glossary

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Conventions Used in This Book

Special graphic symbols are used in this manual to alert you to important points. The following symbols are used:



Highlights a special point of interest about the topic under discussion.



Alerts you that the operation being described can cause problems if you are not careful.



Points to a more complete discussion in another chapter of the current book, or other reference material.



Points to a useful hint that may save you time or trouble.

Aloha Manager

This chapter discusses the components and uses of the graphical user interface with which one interacts with the back-of-house functions in the Aloha system.

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Chapter I

Aloha®

This introduces the Aloha system Back-of-House (BOH) application, Aloha Manager. The Aloha Manager application and its interface brings a completely integrated feel to the BOH workstation. All BOH functions of the Aloha system, regardless of their former locations in earlier versions, are now accessible from within Aloha Manager. BackOffice applications, such as Inventory Control, as well as unrelated software, such as Microsoft® Word® and Excel®, launch from a single location... the Aloha Manager main screen!

This chapter contains information about establishing passwords for employees, and how to navigate within the Aloha system Back-of-House (BOH) application, Aloha Manager. Also included in this chapter is information about how to customize Aloha Manager to make commonly needed functions readily accessible.

In this chapter, you learn how to:

- Establish and change passwords for all employees, including managers.
- Navigate within Aloha Manager to display and use program functions.
- Duplicate or delete database records quickly.
- Add groups and tools to the navigation bar to make commonly used features readily available.
- Make Aloha Manager the only application available to employees, thus enhancing security.
- Tailor the Aloha Manager screen to display introductory graphics directed at specific employee groups for communication or provide access to other functions.

Standard Button Functions

Several button functions are generally available in Aloha Manager. The functions of these buttons are the same in every case, and are similar to buttons used in many Windows applications.

The Save, Edit, Delete, Cancel and Apply command buttons control action taken on data within function tabs:

Save

Click Save to write the data to the disk any time a new record is added or changes are made to an existing record. Otherwise, the changes and additions are discarded.

Edit

Click Edit, press Enter, or click anywhere in the function to display the record in Edit mode.

Cancel

Click Cancel to exit the function tab without writing the changes to disk. All entries since the last time Apply was selected are not saved.

Delete

Click Delete to remove the active record from the database. Use caution when deleting records. Carelessly deleting records can cause serious errors because of the relational nature of the Aloha file structure.

Apply

Click Apply to write the changes to the disk. This is very similar to Save, but keeps the record available for further edit.

Done

Click Done to exit the function.

Security Access

The Aloha system provides employees access to Back-of-House and Front-of-House functions (BOH and FOH, respectively), with a log-in process requiring the input of their employee ID and password. The employee ID and password provide access to both functions, in accordance with the security access established for each employee. This log-in procedure avoids complexity by requiring managers and employees to remember only one user ID and password. This security concept also enables card readers to interface with the system for access to the BOH and FOH systems. The same employee card provides access to the FOH terminal for order entry activities, and to the BOH system for managerial activities, in accordance with the security level assigned to each employee.

Define security setup through the Security Levels function in the BOH application, Aloha Manager. Assign security levels to each employee through Employee maintenance. When an employee logs in, the Aloha system grants access only to functions permitted by the employee's security level. Functions to which the employee has no access are not displayed or display with obviously blocked functionality. This approach enables employees to easily recognize the functions available to them. If an employee who does not have access to back office functions attempts to log on, the only menus available are File, Tools, View, and Help. Functions available on the Shared Navigation Bar display as padlocks, if the employee does not have access to them.

QuickService File Menu

When you launch QuickService, the Aloha Manager Login dialog box displays, as shown in Figure 1-1. When you are logged in, the File menu offers three choices, Change Password, Logout and Exit. If you log out of QuickService, the program continues to run, and the Logout command changes to Login. The Change Password selection is unavailable if you are not logged in to QuickService.

Login

To log in to QuickService, select Login from the File menu. The Aloha Manager Login dialog box displays, as shown in Figure 1-1:



Figure 1-1 Login

Enter your user name and password and click Login. The Aloha Manager interface displays with the options defined in your security access level available to you.

Change Password

Use the Change Password command to change your password for security. This command requires that you know your current password. Select File > Change Password and the Change Password dialog box displays, as shown in Figure 1-2:

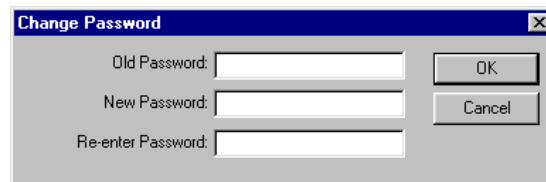


Figure 1-2 Change Password

Enter your old password, and enter a new password in the 'New Password' and 'Re-enter Password' text boxes, and click OK. If the text entered in these two text boxes does not match exactly, the system displays an error, and you must try again, or click Cancel to exit the Change Password function.

If you have forgotten your current password, an employee with access to Maintenance > Labor > Employees can delete your old password using the Clear Back Office Password button located on the Back Office Security sub-tab. Once the password is cleared, select File > Login. Enter your user name and click Login. The New Password dialog box displays, as shown in Figure 1-3:

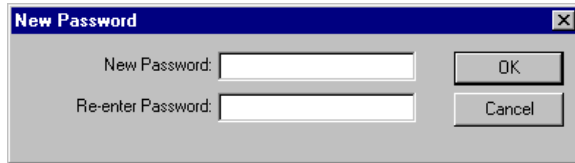


Figure 1-3 New Password

Enter a new password in the 'New Password' and 'Re-enter Password' text boxes and click OK. If the text entered in these two text boxes does not match exactly, the system displays an error, and you must try again, or click Cancel to exit the New Password dialog box.

Logout

Use the Logout command to log out of QuickService without closing the application.

Exit

Use the Exit command to log out of QuickService and close the application. Ensure all function tabs are closed before making this selection.

QuickService Screen Components

QuickService displays the Aloha Manager interface consisting of multiple components that enable and control access to functions and user tools. An example of the Aloha Manager interface is shown in Figure 1-4:

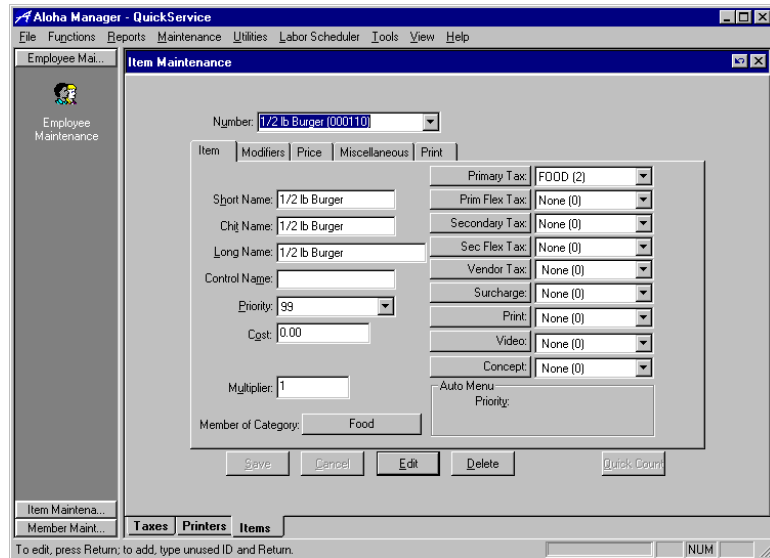


Figure 1-4 Main Screen

Function Tabs

Function tabs, with the label at the bottom, are used for features that are distinctly different from each other. A function tab can contain any of several standard Windows[®] control features, including but not limited to:

- Subtabs (with labels at the top)
- Check boxes
- Option buttons
- Function buttons

- Text boxes
- List boxes


The sample QuickService screen shows three Aloha Manager function tabs running simultaneously. Aloha Manager does not allow more than one instance of a function to run at the same time. The functions active in the example are Taxes, Printers, and Items. The function currently in use is Items, as its tab is on top of the others. To access Printers or Taxes, click the desired tab, or use the Back button to return to the previously used function. Each function currently running displays a tab along the bottom of the function area, with the function name on the tab.


When a new function is executed, Aloha Manager appends the new tabbed dialog to the existing list of currently running functions. If more tabs are displayed than can fit in the application window, buttons display in the bottom right corner enabling you to scroll through the tabs.

Function Tab Title Bar

Each function tab has a title bar at the top containing the following information:

Function name — The function title is left justified and spelled without abbreviations.

Back button — The Back button  is on the right side of the title bar. Click Back to return to the most recently used function tab. For example, in the Items function, you could click the Printer button on the Item subtab to launch the Printers function, then click Back to return to the Items function.

Close button — The Close button  is to the right of the Back button. This button closes the active, selected function. Closing a function tab closes the entire tab. It is not possible to close individual subtabs displayed on a function tab.

Function Subtabs

Some functions contain subtabs, arranged along the top of a function tab. Subtabs divide and organize related features assigned to the function tab into smaller, separate, more manageable work areas, making it less cumbersome to work with the specific function. Subtabs, as implemented in the Aloha Manager interface, function the same way as subtabs in other software, such as Microsoft Word and Excel (Select Tools > Options in these applications to see an example). Click a subtab title to make its features active.

Subtabs differ from function tabs (which display along the bottom of the function area) in that a subtab enables you to work on different areas *within* a function. Function tabs, however, enable you to change to a completely different program function.

The sample QuickService screen shows the Items function tab, which contains four subtabs: Item (the default subtab displayed immediately upon function startup), Modifiers, Price, and Miscellaneous. When you click a subtab, the function switches to the selected subtab and remains in the function, with the current record still selected. The Save, Cancel, Edit, etc. buttons apply to the Item record currently selected (you are *not* required to save information from each subtab).

Perform Database Edits Using Right-Click

The Aloha system provides a quick method to copy and delete records, and ranges of records, when performing maintenance in the database files. This feature is extremely useful when you are building a database. For example, create, and configure one steak, one salad, one soup, one sandwich, one hamburger, one non-alcoholic drink, one beer, one mixed drink, and one dessert. Test each item for correct function in the database. After successfully using these single, example items in a series of tests, use the database editing features to make copies of each one of these proven items to fill out the remainder of the menu. Edit each item copy to give it unique characteristics.

The database editing tools are available only if the function tab is not in edit mode. To access the database editing tools, place the mouse pointer in a vacant area of a function tab, and click the right mouse button. A menu displays, with the following selections available:

- Copy Item
- Copy Range of Items
- Delete Range

If the function tab is in edit mode, the menu displays, but all selections on the menu are unavailable.

Not all menu selections are appropriate for every function in the system. If you make a selection that is not appropriate for the active function, a message displays indicating the selection is not available for the active function.

Database Editing Commands

The basic processes of database editing are similar among the available functions. Each command displays a secondary dialog box in which you may specify the actions desired. Examples of these dialog boxes are provided below. Each dialog box contains drop-down lists. You can select a drop-down list, and then use the up and down arrow keys, on the keyboard, to move from item to item. You can use the Page Up and Page Down keys to move through

the database four items at a time. In this section, the term ‘item’ is used to denote a main record on a function tab. The Menu Items function tab is used as an example for this section because it is one function for which all selections on the database editing menu are available. On other function tabs, the term ‘item’ may refer to employees, printers, or messages, depending upon the active function tab.

Copy Item

Copies an item and all selected attributes to a specific destination in the database. Use the Copy Items dialog box (Figure 1-5) to specify all attributes and modifiers to copy, and the destination to which the item is to be copied. You can copy a single item to a single location or to multiple locations. You can overwrite existing items or create new items. To overwrite existing items, select them from the Begin and End drop-down lists. To overwrite a single item, select the same item in both locations. To create one or more new items, type the beginning and ending numbers in the respective text boxes, or select existing items from the drop-down lists. Any items selected in these text boxes are overwritten.

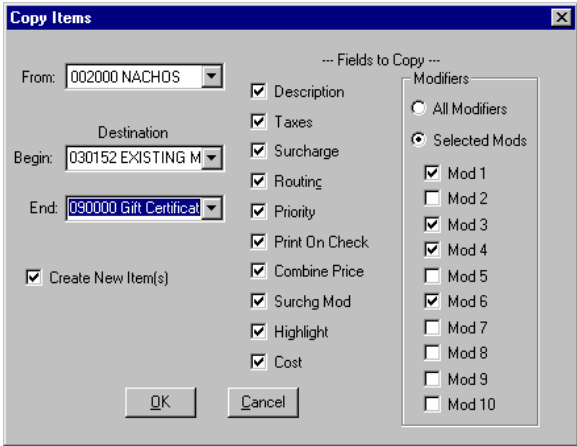


Figure 1-5 Copy Items

Copy Range of Items

Copies a range of items to a specified destination in the database. The functions available in the Copy Range of Items dialog box, as shown in Figure 1-6, are very similar to those in the Copy Items dialog box.

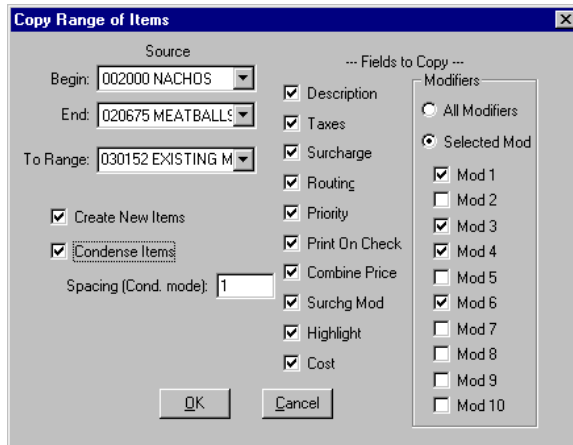


Figure 1-6 Copy Range of Items

The source and destination functions are reversed, in that you select any number of items in a continuous series for the source, and specify a destination item number to which you copy all selected items. Three selections are available for controlling the output of this function.

Create New Items — Creates new items in the database, replacing any items selected or implied in the ‘To Range’ setting.

Condense Items — Condenses the blank spaces in the database until items are added into them.

Spacing (Cond. mode) — Determines the numeric interval at which the new items are created, if ‘Condense Items’ is selected. If you type ‘5’ in this space, the new items are created five numbers apart in sequence, leaving four unused item numbers between each new item.

Delete Range

Deletes items from a specified range. Use this feature to delete a single item or multiple items, depending upon the selections made in the drop-down lists, as shown in Figure 1-7:

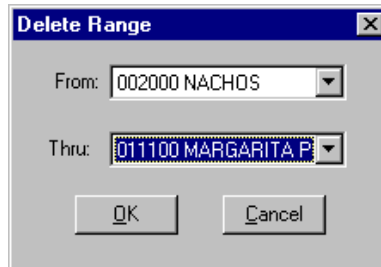


Figure 1-7 Delete Range

Select the first item in the series in the 'From' drop-down list and the last item in the series in the 'To' drop-down list. If you only want to delete a single item, select the same item in both drop-down lists. Click OK to delete the selected items. When deleting a single item, it is much faster to do so from the function tab in which the item is listed.



When copying items or ranges, or when deleting items or ranges, it is important to exercise extreme care, and to plan changes carefully. All changes made using database editing functions are permanent.

Navigation Options

In addition to menu selections, the Aloha system provides navigation bar (nav bar) or keyboard access to functions and user tools. The nav bar is located on the left of the QuickService screen. It includes only groups and shortcuts that have been assigned to it (shared and specific to the employee), unlike the QuickService menu, which contains all functions to which you have access. A function can be run from the nav bar or from the QuickService menu.

Navigation Bar

The Aloha Manager navigation bar enables you to launch associated functions as if the corresponding menu item were selected. The nav bar is displayed upon login and holds groups which contain shortcuts to specific functions. There are three different types of groups; user, shared, and user tools.

User groups are defined by employees for their own personal use. When the employee logs in, the user-specific groups display on the nav bar. Every employee may define user groups to display on the nav bar for their personal use. However, the functions that can be added to the user group are determined by the security level to which they are assigned.

Shared groups are available to every employee that logs in to the system. However, the functions to which the logged in employee does not have access display as a padlock. Only employees assigned to a security level with the Shared NavBar Configuration function selected can maintain shared groups.

Use the user tools group to access applications available on the back-office system or a connected network. Microsoft Word and Excel are examples of user tools. Only employees assigned to a security level with the User Tools Configuration function selected can maintain the user tools group.

The advantage of declaring applications as user tools is they can be run directly from the Tools menu, without leaving the Aloha Manager environment. User tools can also be placed on the nav bar once they are added to the Tools menu. For increased back-office security, set Aloha Manager up so that it can not be shut down (it runs as a service immediately upon system start up). Because all applications, whether they are Aloha software or not, can be run from Aloha Manager, there is no reason to leave its controlled environment.

Customize the Navigation Bar

To access the navigation bar editor, select Tools > Customize from the menu or right-click in the nav bar area and select Customize. The Customize Properties dialog box displays with up to three available subtabs, depending on your security access, User Navigation Bar, Shared Navigation Bar, and User Tools, as shown in Figure 1-8:

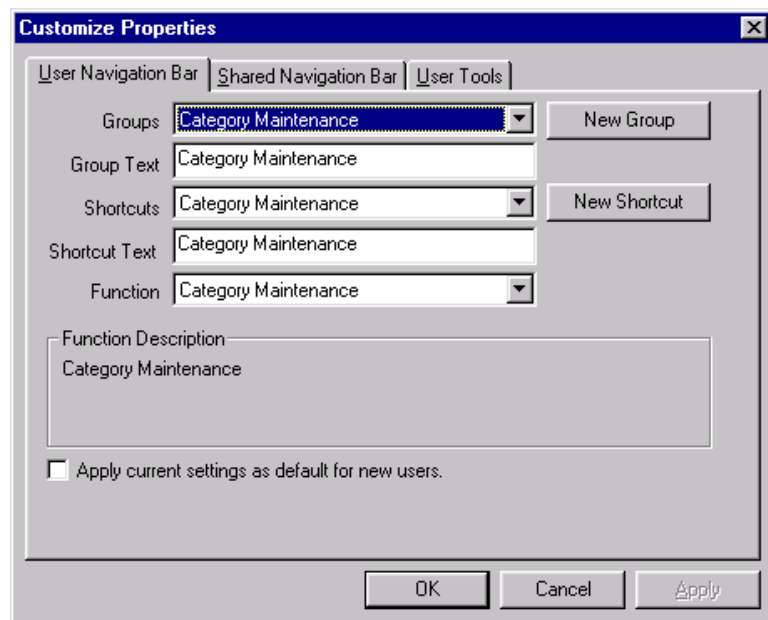


Figure 1-8 Customize Navigation Bar

User Navigation Bar Subtab

You may define groups to display on the nav bar for your own personal use. This capability is defined by the security level to which you are assigned.

Groups — Contains a list of currently defined user groups.

New Group Button

Click New Group to create a new user group on the QuickService nav bar.

Group Text — Holds the descriptive name of the user group that displays on the user navigation bar.

Shortcut — Contains a list of currently defined shortcuts in the selected user group.

New Shortcut Button

Click New Shortcut to create a new shortcut on the QuickService nav bar.

Shortcut Text — Holds the descriptive name of the shortcut to display on the user navigation bar.

Function — Lists the available functions for assignment to the user navigation bar. This list includes any user tools currently defined in the system.

Apply current settings as default for new users — Sets the selected user navigation bar as a default for all new Aloha system users (i.e. employees who have never logged in to the system before). This setting causes the system to save the selected user navigation bar to the default user folder, \IBER-DIR\Profiles\DefUser. New employees who log in to QuickService have access to this user navigation bar, in addition to any other default or shared navigation bars that may be defined in the system.

Until a new employee logs in to QuickService, there is no UsrNNNNN folder for them under the Profiles folder. When the new employee logs in, this folder is created, with the employee number replacing the 'N' symbols in the folder name. The system copies the NAVBAR.CFG file from the default user folder (DefUsr) to the new employee's user folder for use. All new User Navigation Bars saved with the 'default' setting active become, by default, part of new users nav bar configuration. New employees can then add shortcuts to their nav bars, as needed.



New employees only have access to functions defined and made available to them by their security levels.

To customize the user navigation bar:

1. Log in to **QuickService**.
2. Select **Tools > Customize** from the menu or **right-click** in the nav bar area and select **Customize**. The Customize Properties dialog box displays.
3. Click **New Group**, with the User Navigation Bar subtab selected. The text 'New Group' displays in the **Groups** and **Group text** text boxes.
4. Select the 'New Group' text in the **Group Text** text box and type a descriptive name to assign to the user group.
5. Press **Tab**. **Do not** press Enter. The entered text displays in the 'Groups' and 'Group text' text boxes.
6. Click **New Shortcut**. The text 'New Shortcut' displays in the 'Shortcuts' and 'Shortcut Text' text boxes.
7. Select the **function** to add to the user group from the **Function** drop-down list. Remember, the functions displayed in this list are determined by the security level to which you are assigned. The function name is placed in the 'Shortcuts', 'Shortcut Text', and 'Function' text boxes.
8. Select the **Apply current settings as default for new user** check box if you wish to make this navigation bar available by default for all new employees (i.e. employees who have never logged in before).
9. Click **Apply**. The record is saved.
10. Repeat steps **3 through 9** until the desired functions are added.
11. Click **OK** to exit the Customize function and add the new functions to the user nav bar.

Shared Navigation Bar Subtab

Click the Shared Navigation Bar subtab to establish the functions available to every employee that logs in to the system (Figure 1-8).



Logged in employees have access to functions assigned to their security level only. If the logged in employee does not have access to a shared function, a padlock displays on the nav bar.

Groups — Displays currently installed shared groups.

New Group Button

Click New Group to create a new shared group.

Group Text — Holds a descriptive name for the selected shared group or the group that is about to be created.

Shortcuts — Displays currently defined shortcuts in the shared group. When defining a new shortcut, the text ‘New Shortcut’ displays.

New Shortcut Button

Click New Shortcut to create a new shared shortcut.

Shortcut Text — Holds a descriptive name for the shortcut to display in the shared group.

Function — Lists the functions available for assignment to the shared group.

To customize the shared group:

1. Log in to **QuickService**.
2. Select **Tools > Customize** from the menu or **right-click** in the nav bar area and select **Customize**. The Customize Properties dialog box displays.
3. With the Shared Navigation Bar subtab selected, click **New Group**. The text 'New Group' displays in the **Groups** and **Group text** text boxes.
4. Select the '**New Group**' text in the **Group Text** text box and type a descriptive name to assign to the shared group.
5. Press **Tab**. **Do not** press Enter. The entered text displays in the 'Groups' and 'Group text' text boxes.
6. Click **New Shortcut**. The text 'New Shortcut' displays in the **Shortcuts** and **Shortcut Text** text boxes.
7. Select the **function** to add to the shared group from the **Function** drop-down list. Remember, the functions displayed in this list are determined by the security level to which you are assigned. The function name is placed in the 'Shortcuts', 'Shortcut Text', and 'Function' text boxes.
8. Click **Apply**. The record is saved.
9. Repeat steps **3 through 7** until the desired functions are added.
10. Click **OK** to exit the Customize function and add the new functions to the Shared nav bar.

User Tools Subtab

Click the User Tools subtab to add access in QuickService to applications that are available on the back-office computer or network. Microsoft Word and Excel are examples of user tools. When applications are added using User Tools, they display in the Tools menu and only employees assigned to a security level with access to the Tools menu can access them. Once applications are added to the Tools menu, they can also be added to the Shared or User navigation bars.

As with other functions in the Aloha system, applications to which employees have no security level access display as a padlock on the nav bar. Only employees assigned to a security level with the User Tools Configuration function selected can add, edit, or delete items in the user tools group.

Keyboard Support

In addition to the uniformity in functions and their subtabs, there are several standard methods used to move around within subtabs, and for entering and selecting data. The most common method is to click the left mouse button in the desired setting or on the desired button. Keyboard support is also provided for navigating within Aloha Manager function tabs. The following keystrokes are used to navigate within Aloha Manager using the keyboard:

F4 — Displays the drop-down list for the active text box, if applicable.

F10 or Alt — Activates the menu bar so that the keyboard can be used to select a menu command. Use the right or left arrows to make a menu selection.

F12 — Toggles between the HTML page and the open function tab(s).

Ctrl + right or left arrow — Scrolls through open function tabs.

Ctrl + Tab — Moves from subtab to subtab within a function.

Escape — Exits a function.

Tab — Moves forward in the settings on a subtab or dialog box.

Shift + Tab — Moves backward in the settings on a subtab or dialog box.

Space bar — Click a check box or option to activate/deactivate the setting, or tab to the desired setting and press the **SPACE** bar to select or clear it.

Up and Down arrows — Moves forward or backward through the records in the database file.

In addition to these functions, the following keyboard shortcuts common to most Windows-based software are available in Aloha Manager:

Alt+(A) — Selects a function on an active menu or menu bar. Hold down Alt and press the underlined letter in a menu to select the item.

Ctrl+X — Removes (cuts) highlighted data and copies it to the Windows Clipboard for subsequent use in another location.

Ctrl+C — Copies highlighted data to the Windows Clipboard for subsequent use in another location.

Ctrl+V — Pastes information from the Windows Clipboard to an active location, with the cursor designating the point of insertion.

HTML Pages

QuickService dedicates the center right portion of the Aloha Manager start up screen to host HTML pages, and enables you to switch between the active function tabs and the HTML page associated with your login.

Use this feature to: Provide managers with access to important information such as restaurant policies and procedures or to keep them updated with current news from the corporate office; run a local version of the company's intranet; provide link to Internet sites, assuming the site has Internet access. With Enterprise, sites are generally limited to accessing the company's aloha enterprise.com web site only. However, if you prefer to give your employees wider access, you can add additional links to the employee's start up HTML page.

You can assign a different HTML page to display for each security level defined in Back Office Security Level maintenance. Security Levels are then assigned to employees using the Back Office Security subtab located in Maintenance > Labor > Employees.

For example, you can assign a MANAGER.HTM page to the Manager security level. Corporate can be responsible for updating this file with current news, etc. and downloading this file to each site. This file can also contain links to other HTML pages, such as POLICIES.HTM, and CURRENTNEWS.HTM, which are also sent to the sites. When the manager logs in, the MANAGER.HTM page displays. They click on the Policies link to access POLICIES.HTM, and CURRENTNEWS.HTM to learn any information corporate wishes to pass on to them.

The default HTML page is distributed by Aloha Technologies as part of the installation and is stored in a file called MAIN.HTM in the \ALO-HAQS\HTML subdirectory. This HTML page displays when there is no-one logged in to QuickService, and also for employees assigned to a security level that does not have an HTML page specified.



The default HTML page (spinning globe) distributed by Aloha Technologies is great for demonstrating the system. However, if you perform dial-in support, we recommend you replace it with an HTML page that contains generic bitmaps.

In addition to security level-specific HTML pages, you may wish to designate a custom designed default HTML page. Because security is obtained during the log on process, the default HTML page generally contains generic bitmaps or graphics and does not include any type of links. The default HTML page must be named MAIN.HTM. If you create your own default HTML page, you must rename the current default page, and name the new page MAIN.HTM for it to display in Aloha Manager.

Functions

This chapter discusses the functions used to edit deposits and create employee schedules. In addition, third-party accounting applications are accessed through Functions.

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Chapter 2

Aloha®

The Functions menu accesses such features as editing deposits, employee scheduling, and posting to house accounts. In Functions, you also interface with third-party accounting applications.

Select Functions from the menu bar, as shown in Figure 2-1:

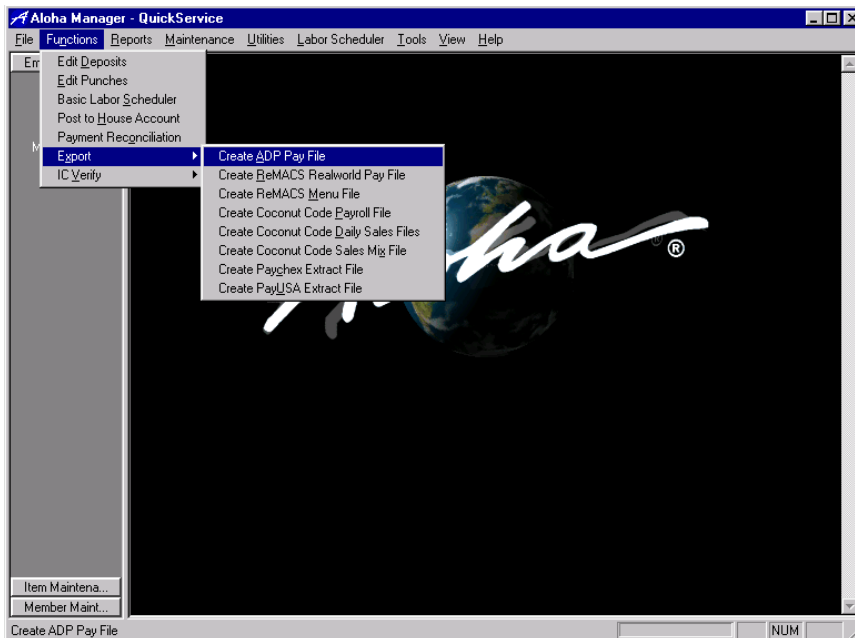


Figure 2-1 Functions Main Menu

In this chapter you learn how to:

- Edit and create deposits.
- Edit and assign punches and paid time off (PTO).
- Edit and create employee schedules.
- Edit and post to house accounts.
- Interface with third-party accounting applications.

Edit Deposits

To make adjustments to deposits, select Functions > Edit Deposits. A Select Date dialog box displays, as shown in Figure 2-2:



Figure 2-2 Select Date

Select the date to adjust from the drop-down list. Click OK and the Edit Deposits screen displays, as shown in Figure 2-3:

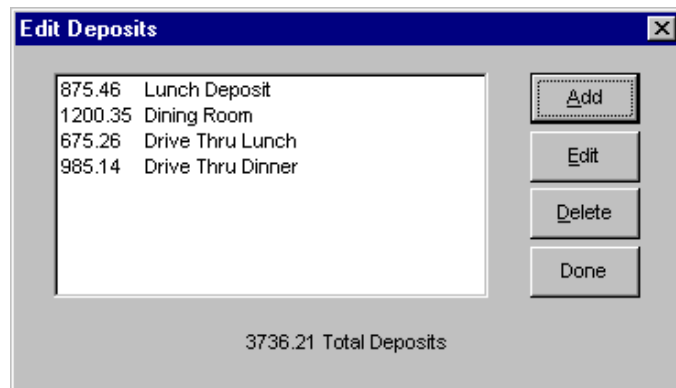


Figure 2-3 Edit Deposits

All deposits for the selected date display in the Edit Deposits window. The total dollar amount of the deposits for that date displays at the bottom of the Edit Deposits dialog box.

Add Button

Click Add to add a deposit for the selected date. The Edit Deposit Entry dialog box displays, as shown in Figure 2-4:

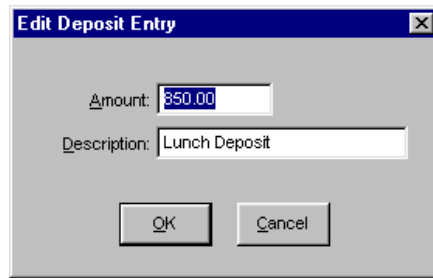


Figure 2-4 Edit Deposit Entry

Amount — Holds the deposit amount.

Description — Holds a description for the deposit.

Enter an amount and a description and click OK. The new deposit is automatically added to the selected date.

Edit Button

Select the deposit in the Edit Deposits window and click Edit. The Edit Deposit Entry dialog box displays (Figure 2-4). Edit the amount and/or the description of the deposit. Click OK to save the change.

Delete Button

Select the deposit to delete in the Edit Deposits window and click Delete. The deposit is automatically deleted.

Edit Punches



Refer to “Other Wage Types”

on page 4-43 in Chapter 4, Labor Maintenance Functions, for more information.



Refer to “Other Wages” on

page 2-12 for more information on adding and editing PTO.

Edit punches enables you to manually edit, add, or delete an employee's punched time for *prior* days. Punches refer to an employee's clock in and out times, hence the phrase, ‘punching the time clock’. The Edit Punches feature explained in this section can only be performed on prior days with available subdirectories. Punches made for the current day are managed from the FOH under Special Functions, provided you have appropriate access rights to make such entries for your employees. The entry does not display in the BOH until a new business day occurs.

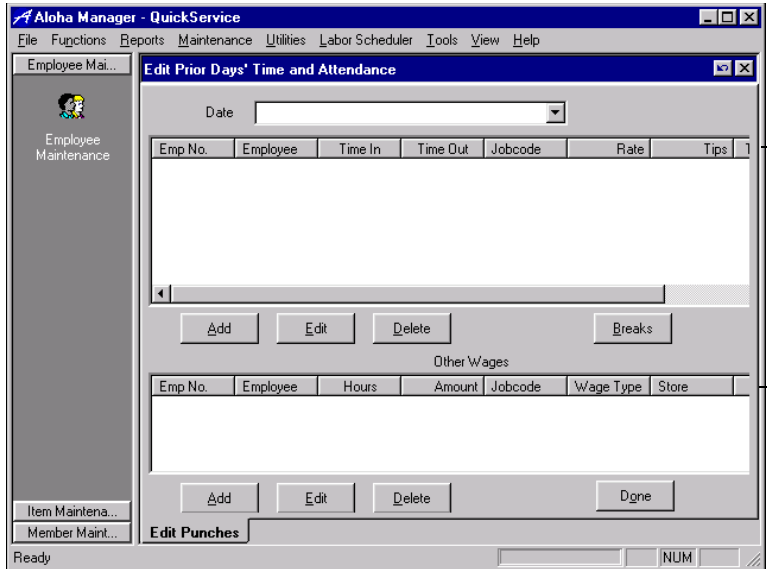
Once they are defined, entries for the Other Wages feature can be performed in the bottom portion of the Edit Prior Days' Time and Attendance screen, shown in Figure 2-5. This enables manual additions, edits and deletions for paid time off (PTO), as well as system generated entries that the employee is due. Paid time off may include jury duty, sick time, vacation time, or any other time that your establishment may designate. This time may be paid in the form of hours, dollars, or both. System generated entries populate the Other Wages portion of the screen based on the shifts and breaks rules defined in the Labor group section of Maintenance > Store Settings.



Your wage types and pay procedures in general should reflect the company policies defined and supported by your establishment.

Edit Prior Days' Time

Select Functions > Edit Punches to display the Edit Punches function tab, as shown in Figure 2-5:



Click a column heading to sort the information on the screen by that heading.

Figure 2-5 Edit Prior Days' Time and Other Wages

The Edit Punches function tab is split into two sections. The Edit Punches for Prior Days section is devoted to punched time functionality. Non-punched PTO and system generated time for shifts and breaks are managed in the Other Wages section of the function tab.

If 'Auto Clockout' is selected on the Employee Settings subtab located in Maintenance > Store Settings > Labor group and an employee forgets to clock out, the employee is clocked out by the EOD process. The employee hours reflect in the selection list for the day.

If 'Auto Clockout' is not selected and an employee forgets to clock out, the employee's shift will not reflect in the selection list for the day. Before these hours can be edited, the employee must clock out and an EOD must be processed. The employee hours are posted to the next business day and can then be edited by selecting this date from the selection list.

Refer to the "Employee Settings Subtab" on page 3-13 in Chapter 3, Store Settings, for more information.

If the '24 Hour Operation' check box is selected on the End of Day subtab located in Maintenance > Store Settings > System group, the EOD clocks out all employees who are clocked in, and then clocks them back in when the EOD is complete. Therefore, even if 'Auto Clockout' is not selected, if an employee forgets to clock out, the employee's hours reflect in the Edit Punches function tab.



You can edit an employee's time for the number of *prior* weeks set on the Employee Settings subtab located in Maintenance > Store Settings > Labor group.

Date — Specifies the date in which you need to make adjustments to time and attendance information from the drop-down list. All time and attendance information for the selected date displays.



To edit punches for the current day, select the Special Functions > Employee > Edit Clock-In or Edit Breaks button from the FOH screen. *You must have the appropriate access level to perform this function.*

When you click Add or Edit, the Edit Shift Data dialog box displays providing the ability to add or edit the following information for an employee's punched time:

Employee — Displays a list of employees for selection in a drop-down list.

Time In — Holds the time the employee clocked in, hours and minutes, using a 36-hour clock (Hours - 36, Minutes - 60). Using a 36-hour clock, the date of business is extended by 12 hours so employee hours are accounted for during the same date of business. For example, the date of business is 01/01/01. After midnight, the date of business remains 01/01/01, but the system date becomes 01/02/01. For an employee who clocks out after midnight (i.e., 2:00 a.m.), to ensure the hours are posted to the corresponding date of business (01/01/01), the clock-out time must be entered using the 36-hour clock. A time after midnight is specified by adding 24 to the hour; therefore, 26:00 is the equivalent of 2:00 a.m. the following day. When the EOD has completed successfully, the date of business is changed and once again coincides with the system date.

Time Out — Holds the time the employee clocked out using a 36 hour clock.

Job Code — Displays predefined job codes for employees in a drop-down list. This is controlled by the 'Punch Edit — Limit Job Codes' check box on the Employee Settings subtab located in Maintenance > Store Settings > Labor group. If this check box is not selected, all defined job codes are available for selection.

Rate — Displays the hourly wage for the employee.

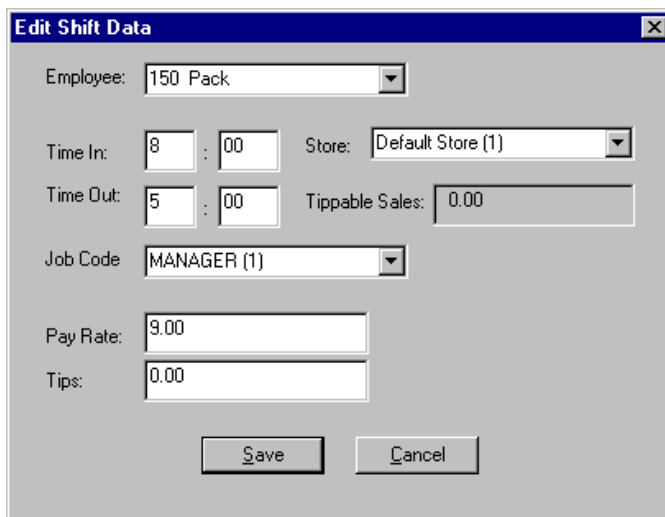
Tips — Displays any declared tips. This amount must be at least as much as the charge tip amount collected by the employee.

Store — Determines the store location to be charged with the employee's hours. This field can only be changed if you are licensed for SuperSite.

Tippable Sales — Generated by the system and is not available for edit.

Add and Edit Buttons

Select a date from the 'Date' drop-down list (Figure 2-5) and click Add or Edit. The Edit Shift Data dialog box displays, as shown in Figure 2-6:



The 'Edit Shift Data' dialog box contains the following fields and values:

Field	Value
Employee:	150 Pack
Time In:	8 : 00
Store:	Default Store (1)
Time Out:	5 : 00
Tippable Sales:	0.00
Job Code	MANAGER (1)
Pay Rate:	9.00
Tips:	0.00

Figure 2-6 Edit Shift Data

Here you can add time to the selected employee or edit the employee's time out or time in. In edit mode, you can only enter information into fields that are active.

Breaks Button

To add or edit a break, select the employee's name in the Edit Prior Days' Time and Attendance window, then click Breaks. The Edit Breaks dialog box displays, as shown in Figure 2-7:

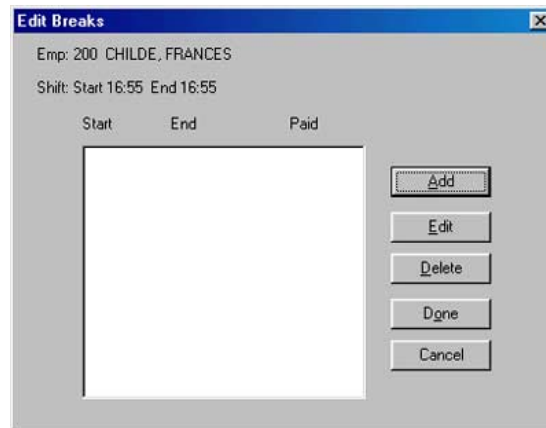


Figure 2-7 Edit Breaks



Either the 'Allow Paid Breaks' or the 'Allow Unpaid Breaks' check boxes on the Job Code subtab must be selected to add or adjust breaks. These check boxes are enabled only if 'Use Break Rules' is selected in Store Settings > Labor group > Breaks subtab. To access the Job Code subtab, select Maintenance > Labor > Job Codes function tab.

Edit Breaks/Add or Edit Buttons

Click Add or Edit to display the Edit Break Record dialog box, as shown in Figure 2-8:



Figure 2-8 Edit Break Record

Time In — Holds the clock in time for the selected employee using a 36-hour clock.

Time Out — Holds the clock out time for the selected employee using a 36-hour clock.

Paid — Indicates whether it is a paid break.

Enter the information and click Save.

Edit Breaks/Delete Button

To delete existing break information, select the employee break and click Delete.

Other Wages

There are two types of other wages; user defined and manually applied, and system generated and applied. You may tell the difference at a glance by looking at the Review column, located at the far right of the Other Wages portion of the screen, shown in Figure 2-5. An asterisk displays if the entry is system generated, while the column is blank if it is a manual entry.

The Other Wages portion of the screen enables manual additions, edits and deletions for paid time off (PTO), as well as edits and deletions for system generated entries that the employee is due. Paid time off may include jury duty, sick time, vacation time, or any other time that your establishment may designate. This time may be paid in the form of hours, dollars, or both. System generated entries populate the Other Wages portion of the screen based on the shifts and breaks rules defined in “Labor” on page 3-12 in Chapter 3, Store Settings, for more information. System generated entries may include:

- Split Shift Premium
- 2nd Shift Minimum
- Meal Period Breaks
- Rest Period Breaks

Operators in California and other states that have specific laws regulating wages, hours, and working conditions may find the functionality of the system generated entries particularly useful. This functionality is reviewed in more detail in Chapter 3, Store Settings, under Labor Group, Shifts and Breaks subtab.

Select Functions > Edit Punches to display the Edit Punches function tab, as shown in Figure 2-9:

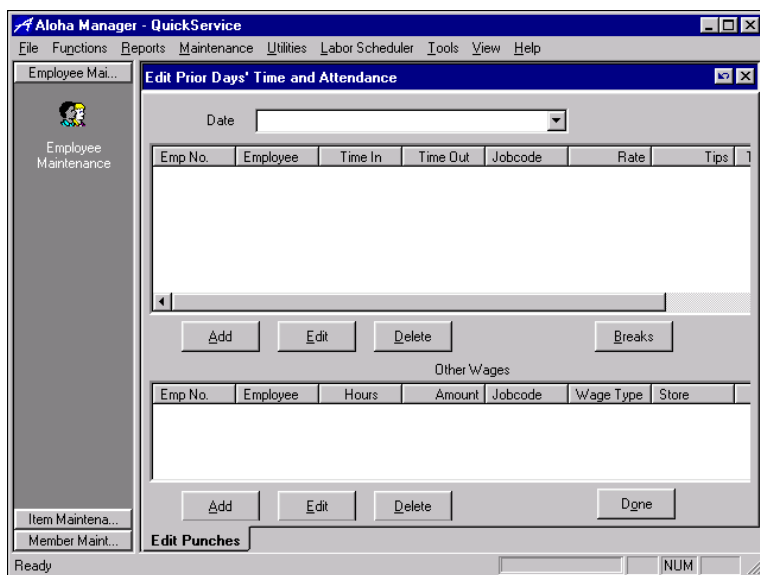


Figure 2-9 Edit Prior Days' Time and Other Wages

The Other Wages functionality is located in the lower section of the function tab.

Employee — Displays a list of employees for selection in a drop-down list.

Hours — Specifies the total hours that employee is due for the corresponding wage type. For example, a typical entry for one day's pay of vacation time might show '8' hours.



You must enter five 8 hour entries, one for each day, to cover a 40 hour vacation.



Refer to Chapter 4, Labor Maintenance Functions, for more information on wage types.

Amount — Specifies the total dollar amount that employee is due for the corresponding wage type. For example, a typical entry for an employee who earns \$6.00 an hour and who will be paid for four hours of sick time is \$24.00. It is possible to enter a negative or debit amount, i.e., \$-4.00, if you are deducting an amount for a uniform or some other authorized deduction. However, deductions to pay should always be supported by documentation in the form of an acknowledgement by the employee for the dollar amount involved.

Job Code — Displays predefined job codes for employees in a drop-down list. This is controlled by the 'Punch Edit — Limit Job Codes' check box on the Employee Settings subtab located in Maintenance > Store Settings > Labor group. If this check box is not selected, all defined job codes are available for selection.

Wage Type — Displays predefined wage types in a drop-down list. Defaults to the first defined wage type. Wage types can represent sick time, vacation, jury duty, or any other predefined type designated by your establishment.

Store — Determines the store location to be charged with the employee's hours. This field can only be changed if you are licensed for SuperSite. This displays as the first store defined, if using SuperSite, or 'Default Store' for non-SuperSite.

Review — Designates a system generated entry, if populated with an asterisk. Designates a user applied entry if blank. The asterisk remains until the user edits or reviews the record.



Before you add a record for other wages, you must set up the corresponding wage type in Maintenance > Labor > Other Wages.

Add or Edit Buttons

Select a date from the ‘Date’ drop-down list at the top of the Edit Punches function tab (Figure 2-9). Select a record to edit and click Edit, or click Add to add a new record for that date. The Edit Other Wages dialog box displays, as shown in Figure 2-10:

Figure 2-10 Edit Other Wage Data

Pay Rate — Displays the pay rate for the selected job code.



A system generated other wage entry cannot be added by the user. You may edit or delete the record. However, it is recommended that you do not delete any records that pertain to the wage and pay policies supported by your establishment.



Refer to “Other Wage Types” on page 4-43 in Chapter 4, Labor Maintenance Functions, for more information on system generated other wage entries.

Total — Displays the total pay rate for the selected job code times the number of hours entered, or displays the amount in dollars entered. If more than one day is selected in the date range, the calculation of this field will be multiplied by the number of days. For example, If five days of vacation are added at the pay rate of \$5.25 and two days have been selected, the total in this field will be \$52.50.

Delete Button

Click Delete to delete an other wage entry. An entry could be system generated due to defined labor codes, common in states such as California. If an entry is deleted, it is recommended that managers print the entry and have the employee sign it to show an agreement. This protects the restaurant from labor disputes.

Basic Labor Scheduler

Basic Labor Scheduler is a built-in feature to the Aloha system that enables the creation of weekly employee schedules. Schedules can also be copied and/or edited once they have been created.



An employee scheduler, such as Basic Scheduler, is a required feature when 'Use Punctuality' is enabled on the Scheduling subtab located in Maintenance > Store Settings > Labor group.



Refer to Chapter 3, Store Settings, for more information.

If the 'Use Schedule' check box is selected on the Scheduling subtab located in Maintenance > Store Settings > Labor group, Employee Scheduler or Aloha Labor Scheduler must be in use. If 'Use Schedule' is not selected, the Basic Labor Scheduler feature can still be used to create schedules, if the manager has access to this feature, although it would not affect employees on the FOH.



Give managers access to Employee Scheduling in Back Office Security Levels located in Maintenance > Labor > Back Office Security Levels.



Refer to "Back Office Security Levels" on page 4-40 in Chapter 4, Labor Maintenance Functions, for more information.

Select Functions > Basic Labor Scheduler to access the Employee Scheduling menu, as shown in Figure 2-11:

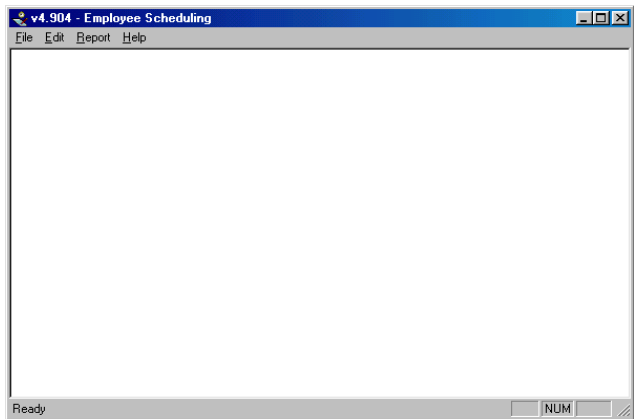


Figure 2-11 Employee Scheduling

File Menu

The File drop-down menu contains two available choices: Print Setup and Exit. Print Setup opens a standard Windows Printer Setup dialog box so that a defined printer can be selected and the paper orientation, source, and size can be set. Select Exit from the File menu to close Employee Scheduling.

Edit Menu

The Edit drop-down menu allows employee work schedules to be created, copied and edited. If a schedule has not previously been created, the Edit Schedule function is used to create a new schedule. If there are existing schedules in the system, a copy of one can be made to use as a future schedule. Changes and updates can be made to new schedules as well as existing or copied schedules. To access this feature, select Edit > Edit Schedule, as shown in Figure 2-12:

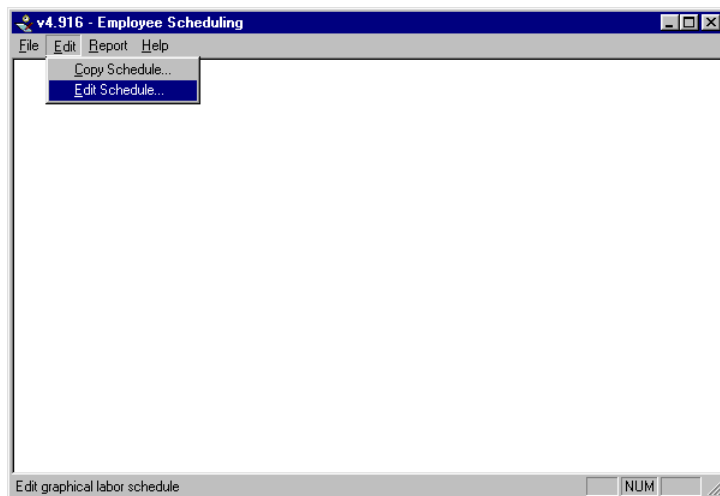


Figure 2-12 Edit Schedule Selection

Copy Schedule

The Copy Schedule function enables you to copy an existing schedule to be used as a future schedule. To copy an existing schedule, select Copy Schedule from the Edit Menu. The Copy Week dialog box displays, as shown in Figure 2-13:

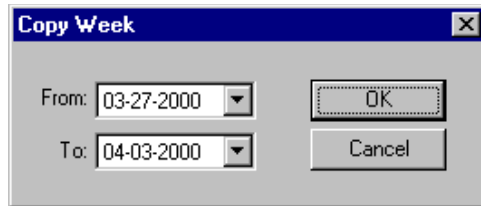


Figure 2-13 Copy Week

Select a date in the 'From' drop-down list, then select a date in the 'To' drop-down list and click OK. The selected schedule is automatically copied.

Edit Schedule

The Edit Schedule function enables the creation or modification of new schedules. To create a new work schedule, select Edit Schedule from the Edit menu. The Select Week dialog box displays, as shown in Figure 2-14:

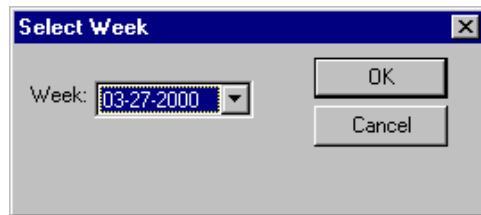


Figure 2-14 Select Week



The 'Day of Business', 'Open Time', and 'First Day of Week' settings are all located on the Date/Time subtab located in Maintenance > Store Settings > System group.

Select the date of the first day of the work week from the 'Week' drop-down list and select OK. Sunday is the default setting for the first day of the week. However, the first day of the schedule and the start time should correspond to the first day of the week for the restaurant. If the first employee needs to be scheduled at 6:00 a.m., 'Open Time' needs to be set to 06:00, therefore, causing the Labor Scheduler screen to start with 6:00 a.m. If the default setting is used, all schedules begin on Sunday and end on Saturday and are saved using Sunday's date. Click OK to display the Labor Schedule dialog box, as shown in Figure 2-15:

days of the week

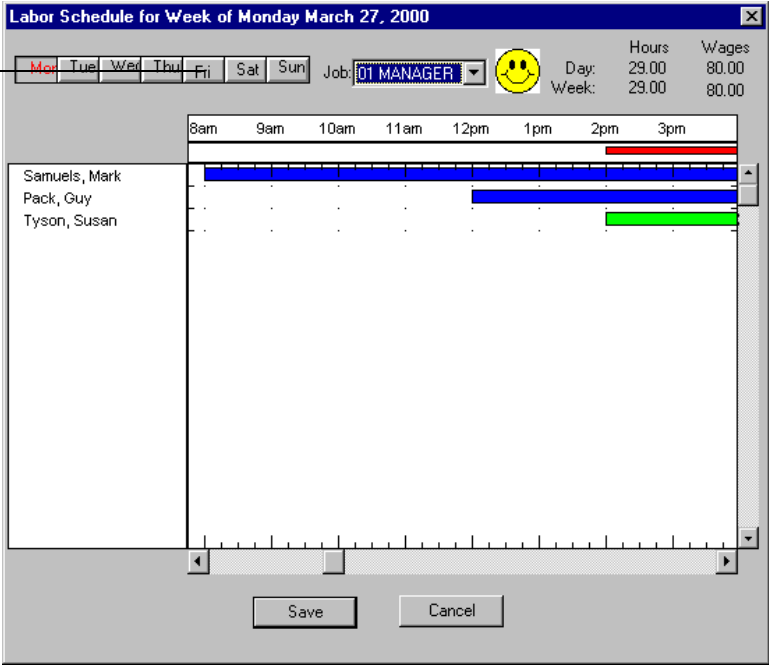


Figure 2-15 Labor Schedule

Days of Week — Determines the day of the week in which you are working. Select a day of the week from the row of days at the top left of the screen.

Job — Holds predefined job codes in the drop-down list. Related buttons for job codes display next to the list. Employees assigned to the selected job code display in the list box on the left of the screen.



Refer to Chapter 4, Labor Maintenance Functions, for more information.

Hours — Displays a running total of the hours for the selected day and week.

Wages — Displays a running total of the wages for the selected day and week. Schedules are set up by day and job code.

Time Slice — Represents each employee's schedule, using a horizontal bar.

To create a time slice, position the cursor, using the mouse, to the right of the employee's name at the desired start time. Click the left mouse button and drag the cursor to the right until it is aligned with the desired end time and release the mouse button. The time slice appears in blue for the selected employee.

A time slice can be modified in length, or it can be moved to another employee. Click the time slice to modify. The color turns to green, indicating it is selected and in edit mode. To modify the length, place the cursor on the start or end time until it becomes a double arrow, then click and drag to the left or right to lengthen or shorten the time slice. To move the time slice to another employee, place the cursor in the middle of the time slice until it becomes a hand-shaped cursor. Click and drag the time slice to the new location, and release the mouse button. Double-click a time slice to delete it, and respond to the 'delete shift' confirmation prompt.

If an employee has more than one job code and is scheduled under a different job code than the one currently being edited, the time slice displays in gray and cannot be edited.

Print Schedule Reports

The Reports menu enables the production of printed reports for labor schedules. Once selected, reports are sent directly to the printer defined in File > Print Setup in Employee Scheduling.

The Employee Scheduling choice has three report format options: Regular, With Wages, and By Job Code, as shown in Figure 2-16:

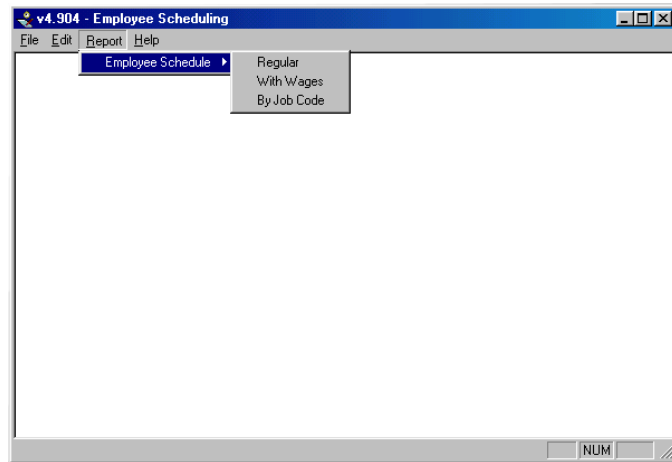


Figure 2-16 Reports Menu Format Options

Regular

Contains hourly information and can be used as a posted schedule.

With Wages

Contains estimated labor costs and is often used as a management tool.

By Job Code

Groups the report content by job code.

All Scheduled Labor reports list scheduled labor for the week in dollars. Select any one of the reporting options and a prompt for the week to print displays, as shown in Figure 2-17:

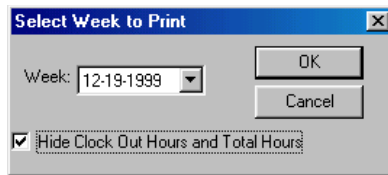


Figure 2-17 Select Week to Print

Week — Displays dates for selection in the drop-down list.

Hide Clock Out Hours and Total Hours — Omits the employee schedule and total hours from the report.

House Accounts

House Accounts lets you manage house account activity by applying credits, payments, and debits to an account.

Select Functions > Post to House Account to display the Post to House Account function tab, as shown in Figure 2-18:

The screenshot shows the 'Post Payment to House Account' window. The 'Account' dropdown is set to '01000 GREGSON'. The 'Amount' text box contains '12.50'. The 'Current Balance' text box shows '-50.00' and the 'New Balance' text box shows '-37.50'. The 'Debit' radio button is selected. The 'OK' and 'Done' buttons are at the bottom. The sidebar on the left has 'Employee Maintenance' selected. The bottom of the window shows a 'Post to House Account' tab and a 'NUM' button.

Figure 2-18 Post to House Account



Select 'Payment', 'Audit', or 'Debit' before entering an amount in the 'Amount' text box. This prevents the incorrect display of the running balance.

Account — Displays a list of predefined house accounts.

Amount — Specifies the amount to post to the account.

Payment — Indicates a payment is being posted to the house account

Credit — Indicates a reduction, other than a payment, is being posted to the house account.

Debit — Indicates a debit is being posted to the house account.

Current Balance — Displays the current balance of the account.

New Balance — Displays the new balance of the account, once the current transaction is applied.

Post Transactions to a House Account

Payments, credits, and debits can be posted to a house account for any day from the BOH. This is usually done when the customer makes a payment or credit to the account, however the credit is posted to the customer's balance, not to a particular check.

Select Functions > Post to House Account, as shown in Figure 2-19:



Figure 2-19 Post to House Account Path

The Post Payment to House Account dialog box displays, as shown in Figure 2-20:

The screenshot shows a software window titled "Aloha Manager - QuickService". Inside, there's a sub-window titled "Post Payment to House Account". The sub-window has a menu bar with "File", "Functions", "Reports", "Maintenance", "Utilities", "Labor Scheduler", "Tools", "View", and "Help". Below the menu bar is a toolbar with icons for "Employee Maintenance", "Item Maintenance...", and "Member Maint...". The main area of the sub-window contains a form with the following fields: "Account" (a drop-down menu), "Amount" (a text box), "Current Balance" (a text box showing "0.00"), and "New Balance" (a text box showing "0.00"). To the right of these fields are three radio buttons labeled "Payment", "Credit", and "Debit", with "Payment" selected. At the bottom of the form are two buttons: "OK" and "Done". The sub-window has a status bar at the bottom showing "Post to House Account" and "Ready".

Figure 2-20 Post Payment to House Account

To post a transaction to a house account:

1. Select a predefined **house account** name in the **Account** drop-down list and press **Enter**.
2. Enter the **amount** to post to the account in the **Amount** text box.
3. Select **ONE** of the following **options** for the account. The amount is reflected in the 'Current Balance' and 'New Balance' text boxes.

Payment — Indicates a payment is being posted to the house account.

Credit — Indicates a reduction, other than a payment, is being posted to the house account.

Debit — Indicates a debit is being posted to the house account.

4. Click **OK** and **Done** to exit the Post Payment to House Account dialog box.

Print House Account Invoices

You can print an invoice for a house account for distribution.

To print an invoice for a house account:

1. Select **Reports > House Accounts**, as shown in Figure 2-21:

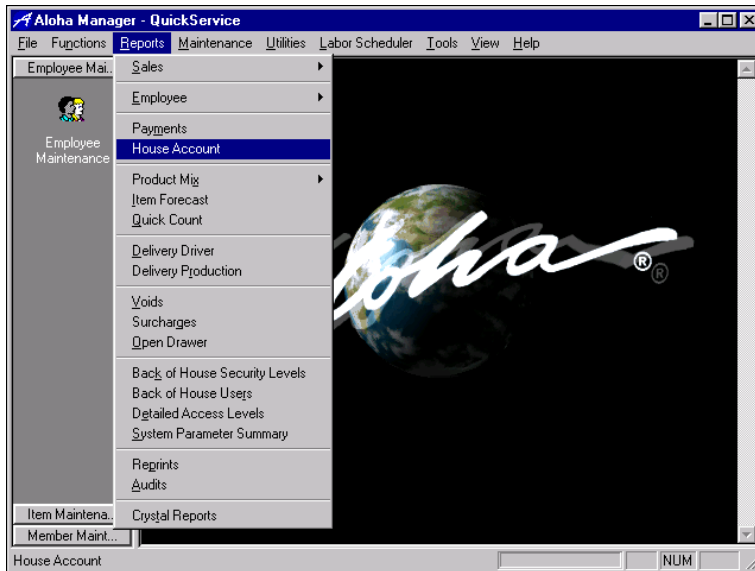


Figure 2-21 House Account Invoice Path

The Print House Accounts dialog box displays, as shown in Figure 2-22:

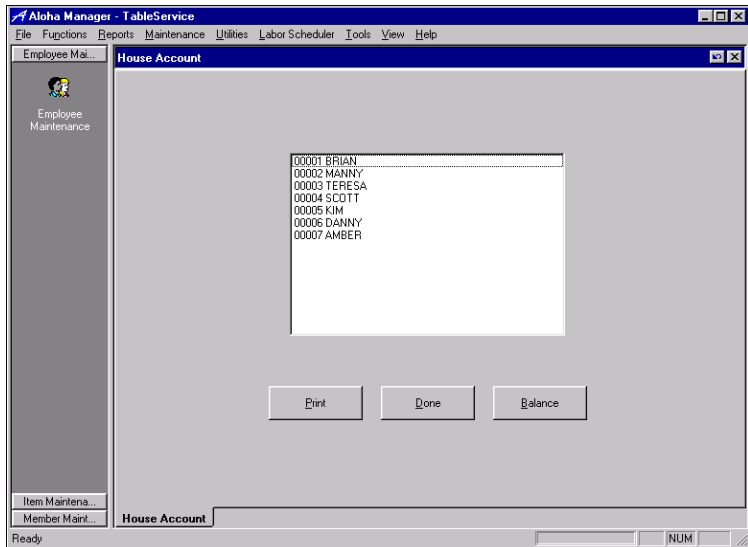


Figure 2-22 Print House Accounts Invoice

2. If applicable, click **Balance** to consolidate all existing transactions on the accounts and create balance forward totals (display on statements as a previous balance). This is normally done after printing statements for the current month. Infrequent consolidation creates long statements, and premature consolidation drops transaction details from current statements.
3. Select an **account** from the list and click **Print**. The report is printed to the local printer.
4. Click **Done** to exit the Print House Accounts dialog box.

Payment Reconciliation

Payment Reconciliation provides a simple automated method of reconciling cash drawers. This functionality is an enhancement to the 'Must Declare Cash' function by defining the requirements of how the employee declares the payments they received. For example, the employee can be required to enter the transaction detail for a particular type of credit card or total of all transactions for that credit card. A calculator is provided to assist in counting cash and non-cash payments. This feature can be set up to run from the FOH, or from the BOH for additional security.

A variance level can be specified for an accumulation of cash tender types while non-cash tender types can require the employee to enter total amounts of itemized transactions per tender type. The difference between the entered amounts and the system-calculated amounts must be within these specifications prior to the completion of a checkout. If an employee exceeds a specified number of checkout attempts, a message displays and a manager is required to complete the reconciliation.

The Payment Reconciliation command is not available unless it is set up to run from the BOH. Refer to the Payment Reconciliation section of the Special Features manual for information on running this function.



This section discusses the Team Tip Distribution procedures. Refer to the QuickService Special Features Guide for setup requirements.



Refer to the “Electronic Payroll Settings Subtab” on page 3-23 in Chapter 3, Store Settings, for more information.

Export

The Export submenu enables export files for use with third-party accounting applications to be created.

Select Functions > Export from the menu bar, as shown in Figure 2-23:

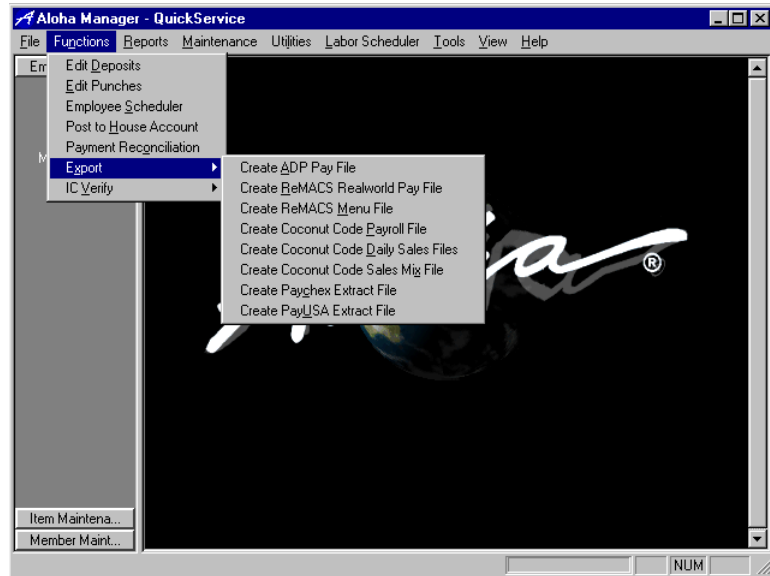


Figure 2-23 Export Menu

Create ADP Pay File

Select create ADP Pay File. The ADP dialog box, as shown in Figure 2-24, prompts for the date(s) to use for creating the export file:

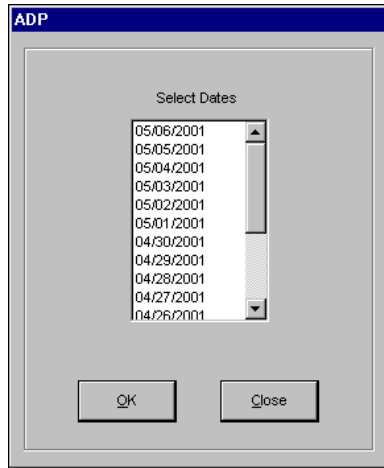


Figure 2-24 ADP Pay File

Select the date or range of dates to export and click OK.

The message, 'You must now run the ADP validation program' displays. Click OK and run the ADP validation program. The EXTPAYxx.yyy file is created, where xx is the ID and yyy is the company ID. This file is placed in the \ALO-HAQS\PCPERS subdirectory.

Create ReMACS RealWorld Pay File

Select Create ReMacS Realworld Pay File. The RealWorld Payroll dialog box, shown in Figure 2-25, prompts for the date(s) to use for creating the export file:

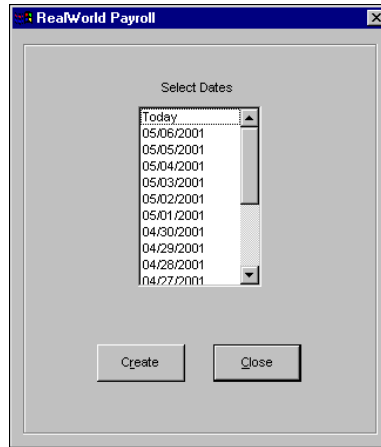


Figure 2-25 RealWorld Payroll

Select the date or range of dates to export and click OK.

The PAYROLL.FLT file is created and placed in the \ALOHAQS directory.

Create ReMACS Menu File

Select Create ReMacS Menu File. The Menu Item Sales File Creation dialog box, shown in Figure 2-26, prompts for the date(s) to use for the export file:

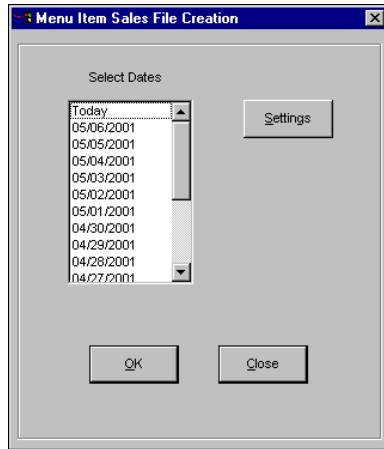


Figure 2-26 Menu Item Sales File Creation

Select the date or range of dates to export and click OK.

The MENUSALE.FLT file is created and placed in the \ALOHAS directory.

Settings Button

Click Settings to open the Menu File Settings dialog box, as shown in Figure 2-27:

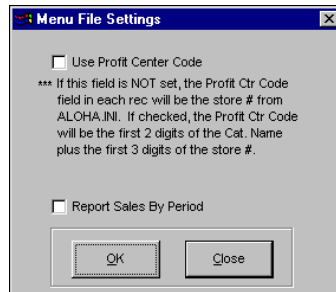


Figure 2-27 Menu File Settings

Use Profit Center Code — Assigns a profit center code made up of the first two digits of the category number plus the first three digits of the store number.

Report Sales by Period — Defines the sales report based on a period.

Click OK to return to the first screen. Click OK again to create the file.

Create Coconut Code Payroll File

Select Create Coconut Code Payroll File. The Create Coconut Code Time Card Output File dialog box, shown in Figure 2-28, prompts for the date(s) to use for the export file:

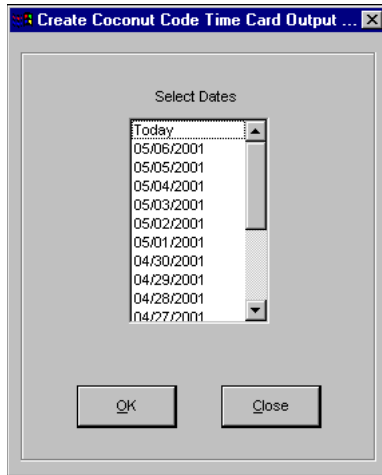


Figure 2-28 Coconut Code Time Card Output

Select the date or range of dates to export and click OK.

The CCTIME.TXT file is created and placed in the \ALPHAQS directory.

Create Coconut Code Daily Sales Files

Select Create Coconut Code Daily Sales File. The Coconut Code Daily Sales File dialog box, shown in Figure 2-29, prompts for the date(s) to use for the export file:

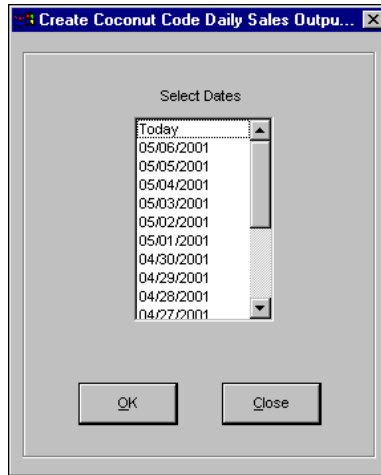


Figure 2-29 Coconut Code Daily Sales Output

Select a date or range of dates to export and click OK.

The following .TXT files are created and placed in the \ALOHAS directory:

- CCGCREDM.TXT
- CCGCSOLD.TXT
- CCHOUSE.TXT
- CCNDPTY.TXT
- CCPETTY.TXT
- CCSLS.TXT

Create Coconut Code Sales Mix File

Select Create Coconut Code Sales Mix File. The Coconut Code Sales Mix Output File dialog box, shown in Figure 2-30, prompts for the date(s) to use for a the export file:

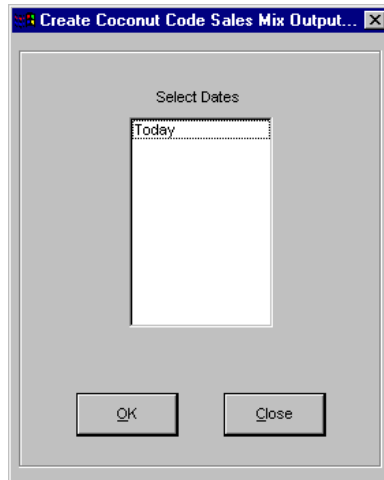


Figure 2-30 Coconut Code Sales Mix Output

The CCPMIX.TXT file is created and placed in the \ALOHAQS directory.

Create Paychex Extract File

The Paychex Pay File created by the Aloha POS system contains the following information, in addition to the Paychex branch number, client number, and site code:

- Employee number
- Department number
- Regular hours worked
- Overtime hours worked
- Pay rate
- Tips due
- Declared tips
- Gross Wages

To create the Paychex Pay File, select Functions > Export > Create Paychex Pay File. The Aloha Grind Program dialog box displays, enabling the Grind program to process the Paychex Pay File. When Grind is through processing the Pay File, a Notice message box displays. Click OK.

Create PayUSA Extract File

The Create PayUSA Extract File command creates two files. The first file contains the following information:

- Employee number
- Hours worked code
- Hours worked
- Job cost
- Account number
- Rate

The second file contains the following information:

- Employee number
- Deduction / Earning code
- Hours
- Rate
- Declared tips

To create the PayUSA Extract File, select Function > Export > Create Pay-USA Extract File. The Aloha Grind Program dialog box displays, enabling the Grind program to process the PayUSA Extract Pay File. Running the Pay-USA Extract File extracts data for the days selected in the pay period to the PAYUSA folder in the \ALOHAS directory.

ICVerify

The ICVerify submenu is used to interface the Aloha POS system with ICVerify, a third-party credit card processing company.



Define the number of IC Verify terminals in the 'Number ICVerify Terminals' check box on the EDC Setup subtab located in Maintenance > Store Settings > Credit Card group.



Refer to the
Aloha EDC

User's Guide if you are
using Aloha EDC for credit
card processing.

Select Functions > ICVerify from the menu bar, as shown in Figure 2-31:



Figure 2-31 IC Verify Menu

Settle Current Batch

When you are ready to settle your batch, select Settle Current Batch from the IC Verify submenu. A confirmation dialog box displays to verify the settlement, as shown in Figure 2-32:

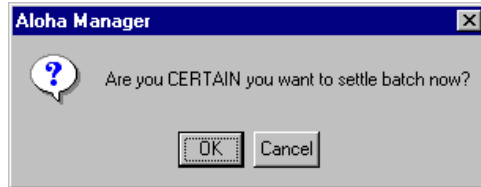


Figure 2-32 Settle Batch Confirmation

Click OK to run the batch settlement.

Print Settlement

The Print Settlement feature enables you to print a report of the batch you have just settled. Click Print Settlement and a confirmation dialog box displays to verify printing, as shown in Figure 2-33:

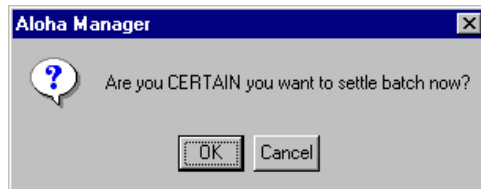


Figure 2-33 Print Verification

Click OK to print settlement.

Store Settings

This chapter discusses the Store Settings functions within Aloha Manager. You will gain an understanding of each store settings group, the available functionality for each group, and how to create customized settings for your store.

Order Entry	3-5
Labor.....	3-12
Financials.....	3-39
Printing.....	3-48
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Chapter 3

Aloha®

Store Settings is used to create global settings for the restaurant. You can establish order policies, labor and scheduling restrictions, tax policies, and receipt print qualities. Policies that you create in Store Settings are enforced throughout the entire restaurant.

To access Store Settings, select Maintenance > Store Settings, as shown in Figure 3-1:

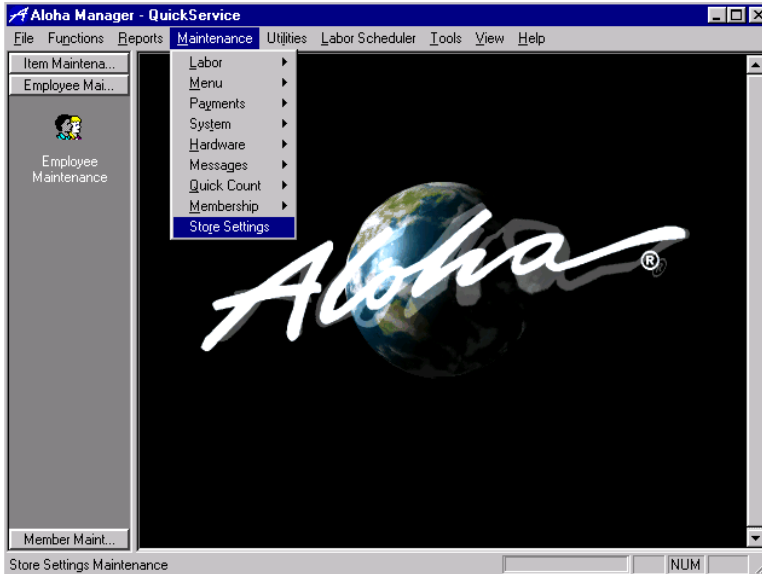


Figure 3-1 Store Setting Menu Option

Upon selecting Store Settings, the Store Settings function tab displays. The Group drop-down list contains groups which may be selected to set policies. Each of the groups, their subtabs, and check box settings are discussed in this chapter. Default values have been established in some of these functions, therefore, they do not have to be edited. However, these items are specific to a particular restaurant or group of restaurants, and should be reviewed.

In this chapter you learn how to:

- Define order entry settings, such as SKU options, and pizza pricing options.
- Establish employee scheduling rules, employee setting rules, clock in/out procedures, electronic payroll settings, and shift and break rules.
- Define taxes and surcharges, reports, and house accounts.
- Define print settings for checks, chits, reports, and employee check-out configuration.
- Select user interface options for the POS and Order Entry screens, and FOH screen layout.
- Define security settings for the POS, employee passwords, access restrictions, and cash drawer restrictions.
- Set up system features, such as the date and time, security key information, interface usage, Aloha settings, and End-of-Day settings.
- Define international dates, currency standards and rounding options, and taxes.

Order Entry

The Order Entry group enables you to establish policies and procedures for taking orders and handling guests. To access the store settings for Order Entry, select Maintenance > Store Settings. The Store Settings function tab displays with the Order Entry Group displayed as the default group, and the Guest Count displayed as the default subtab, as shown in Figure 3-2:

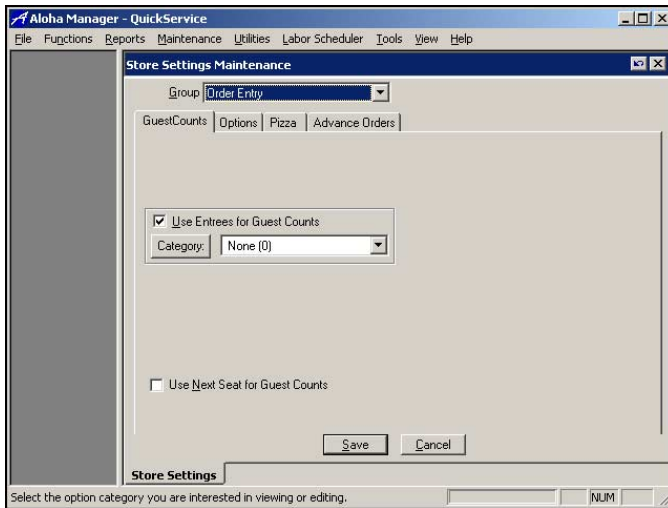


Figure 3-2 Order Entry Group, Guest Count Subtab

The Order Entry group provides the following subtabs: Guest Count, Options, Pizza, and Advance Order.

Guest Counts Subtab

The Guest Counts subtab enables you to calculate guests by entrees and select the category for counting.

Use Entrees for Guest Counts — Determines the guest count using the category selected in the entree Category drop-down list. Each time you order an item from the selected category, the guest count increases by one. You can

assign items to hold more than the default weight of one in Maintenance > Menu > Items.



A revenue item is not a sales item. If you have a guest check with just a revenue item, such as a gift card, the guest check for that check remains at 0 (zero).

Use Next Seat for Guest Counts — Enables you to count each sub-order as a guest when using the Sub-orders feature.



If you select 'Use Entrees for Guest Count', and 'Use Next Seat for Guest Counts', when you enter a sub-order using the Next Seat button, the system determines the guest count using 'Use Entrees for Guest Count'.

Category Button

Click Category to access the Categories function tab. Here you can perform maintenance in the Categories function, including add new records if the category you need is not already there.

Category — If guests are counted by entree, determines the category to use for entree counting from the drop-down list.

Options Subtab

The Options subtab enables you to establish an open item number to use if an SKU that is unrecognized by the system is entered for sale. Select the Options subtab from the Order Entry group, as shown in Figure 3-3:

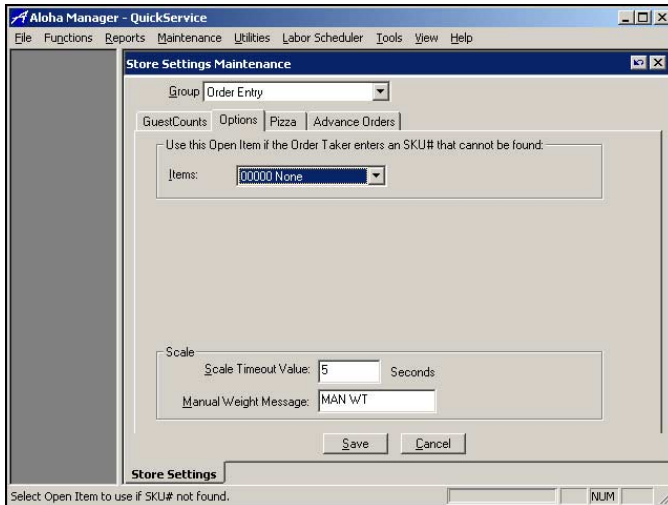



Figure 3-3 Order Entry Group, Options Subtab

Use this open item if the order taker enters a SKU# that cannot be found:

Items — Designates the item to use when the entered item is not recognized by the system.

Scale Inset

Scale Timeout Value — Specifies the number of seconds the system waits for three consecutive identical scale readings. When the system exceeds the number, you have the option to retry a reading or make a manual entry. Enter from three to 99 seconds. The default number of seconds is five.

 Refer to the Pizza Modifiers feature in the Special Features Guide for more information on setting up pizza.

Manual Weight Message Text — Holds the text to display on the guest check used when you enter a manual weight. Enter up to 15 alphanumeric characters. The default text is ‘MAN WT’.

Pizza Subtab

This subtab enables you to establish pizza pricing options. Select the Pizza subtab from the Order Entry group, as shown in Figure 3-4:

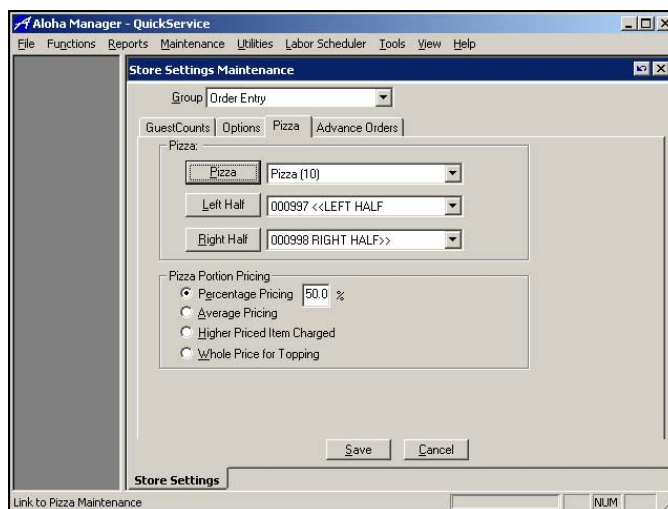


Figure 3-4 Order Entry Group, Pizza Subtab

Pizza — Select the predefined category that includes all the pizza menu items from the drop-down list. A category must be selected, or the Pizza Modifier screen will not display when ordering those items on the FOH terminal.

Pizza Button

Click Pizza to access the Categories function tab. Here you can perform maintenance in the Categories function, including add new records if the category you need is not already there.

Left Half — Select the item to represent the left half of the pizza from the drop-down list. Items are set up in Maintenance > Menu > Items. The name of this item is displayed on the guest check when using the Pizza Mod feature.

Left Half Button

Click Left Half to access the Items function tab. Here you can perform maintenance to the Items function, including add new records if the item you need is not already there.

Right Half — Select the item to represent the right half of the pizza from the drop-down list. Items are set up in Maintenance > Menu > Items. The name of this item is displayed on the guest check when using the Pizza Mod feature.

Right Half Button

Click Right Half to access the Items function tab. Here you can perform maintenance in the Items function, including add new records if the item you need is not already there.

Pizza Portion Pricing Inset

Percentage Pricing — Specifies the percentage of the topping price to charge for half toppings. For example, if 60% is entered as the percentage and the charge for the pepperoni topping on a large pizza is \$1.00, the charge for half a portion of pepperoni is \$.60. The default percentage is 50%. Percentage Pricing is the default selection.

Average Pricing — Adds the cost of the toppings on each half of the pizza to the base pizza price as if it were charging for a whole pizza to get a total for each half, adds the two totals, then divides it by two to get the average. For example, if a customer orders a Large Pizza with a base price of \$12.00 and wants bacon - \$1, extra cheese - \$.75, and onions - \$.50 on the right half, and only green peppers - \$.50 on the left half, the average price is calculated based on the following:

Right Half:	\$14.25
Left Half:	\$14.25
$\$14.25 + \$12.50 / 2 =$	\$13.38

Higher Priced Item Charged — Adds the cost of the toppings on each half of the pizza to the base pizza price as if it were charging for a whole pizza to get a total for each half, then charges the customer the highest total. For example, if a customer orders a Large Pizza with a base price of \$12.00 and wants bacon - \$1 on the right half, and extra cheese - \$.75 on the left half, the price is calculated based on the following

Right Half:	\$13.00
Left Half:	\$12.75

The customer is charged the higher price of \$13.00.

Whole Price for Topping — Calculates the toppings at full price. No discounts are given for split toppings. For example, if a customer orders a Large Pizza with a base price of \$12.00 and wants bacon - \$1 on the right half, and hamburger - \$1.00 on the left half, the price is calculated based on the following

Base Price:	\$12.00
Bacon:	\$1.00
Hamburger:	\$1.00
Total	\$14.00

Advance Orders Subtab

The Advance Orders subtab enables you to establish how you place advance orders in order entry queues, and to define the default increment for preparation time. Select the Advance Orders subtab from the Order Entry group, as shown in Figure 3-3:

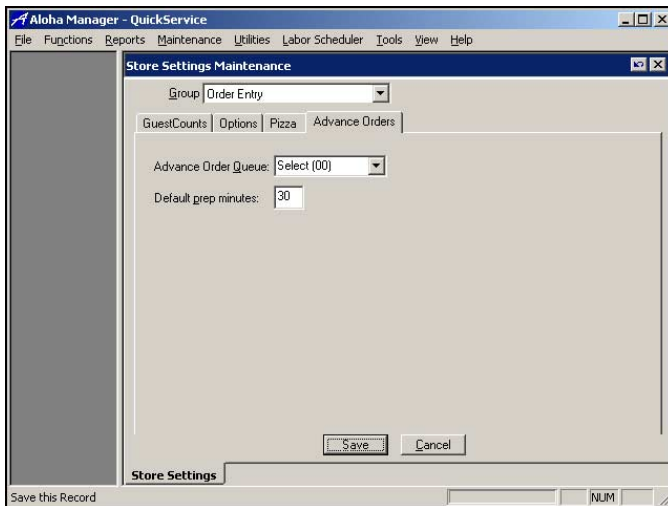


Figure 3-5 Order Entry Group, Advance Orders Subtab

Advance Order Queue — Establishes the order entry queue in which to automatically place all of your advance orders. If you select ‘Select 00’, you can choose a queue for each advance order. If you are using advance orders, you may want to define a new queue specifically for advance orders.

Default Prep Minutes — Defines the default increment for preparation time needed for advance orders. For example, if you type 30 minutes, you can only use increments in 30 minutes, such as 30, 60, 90, and 120 minutes.



Refer to the
Advance

Orders feature in the Special Features Guide for more information on setting up advance orders.



Refer to Order
Entry Queues

in Chapter 7, System Maintenance, for more information on defining order entry queues.

Labor

The Labor group enables you to establish policies and procedures for scheduling, payroll, checkout, and clock in/out functions. To access the Labor group settings, select Maintenance > Store Settings. Select Labor from the Group drop-down list. The corresponding subtabs display, with Scheduling as the default subtab, as shown in Figure 3-6:

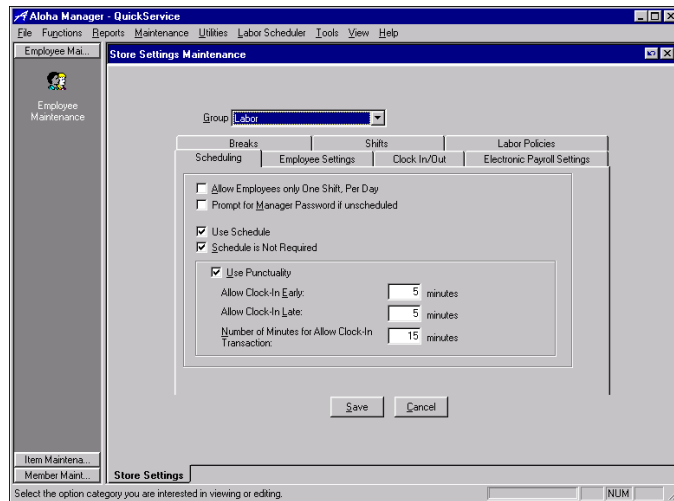


Figure 3-6 Labor Group, Scheduling Subtab

The Labor group provides the following subtabs: Scheduling, Employee Settings, Clock In/Out, Electronic Payroll Settings, Breaks, Shifts, and Labor Policies.

Scheduling Subtab

The Scheduling subtab enables you to define scheduling requirements for each employee, such as multiple shift allowances, schedule requirements, and punctuality control features.

Allow Employees Only One Shift, Per Day — Employees can work only one shift per day.

Prompt for Manager Password if Unscheduled — Prompts for a manager's password if an employee attempts to clock in but is not scheduled to work.

Use Schedule — Activates either Aloha Employee Scheduling or Aloha Labor Scheduler, depending upon which scheduling program you use.

Schedule is Not Required — Specifies that employees can clock in even if not scheduled for the current day. If scheduled, the employee must clock in at the assigned time.

Use Punctuality Inset

Use Punctuality — Enables the Punctuality Control features, subject to the limits set in the three Punctuality Control fields. Employees must be scheduled to work in the scheduling program or they are not allowed to clock in.

Allow Clock-In Early — Specifies the number of minutes before the start of a scheduled shift that an employee is allowed to clock in.

Allow Clock-In Late — Specifies the number of minutes after the start of a scheduled shift that an employee is allowed to clock in.

Number of Minutes for Allow Clock-In Transaction — Specifies the number of minutes that employees have to attempt to clock in before manager intervention is required.

Employee Settings Subtab

This subtab enables you to define employee settings such as minimum wage, employee age requirements, time clock settings, enabling edit punch reasons

and break return options, and more. Select the Employee Settings subtab from the Labor group, as shown in Figure 3-7:

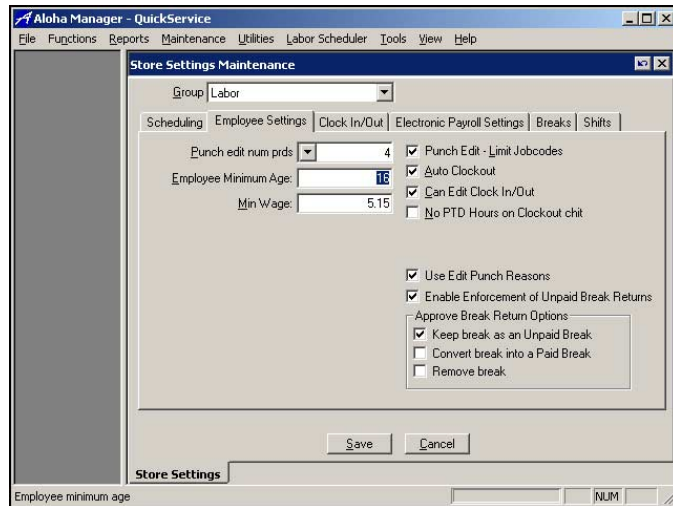


Figure 3-7 Labor Group, Employee Settings Subtab

Punch Edit Num Prds — Specifies the maximum number of weeks you can edit in Functions > Edit Punches. Select from one up to four previous weeks.

Employee Minimum Age — Defines the youngest age that is allowed for employees to work.

Min Wage — Specifies the minimum wage rate for non-tipped employees.

Punch Edit - Limit Job Codes — Limits job codes that can be selected to those assigned to the employee.

Auto Clockout — Automatically clocks out employees who are still clocked in during the End-of-Day routine. If an employee has already run a checkout, the system clocks the employee out at the time of the checkout. If the job code does not have 'Order Entry' selected, it clocks the employee out at the time the EOD is run. If 'Auto Clockout' is not selected, employees who do not clock-

out properly do not appear on the Edit Punches screen until they have clocked out, and an EOD is processed.



In a 24-hour operation, 'Auto Clockout' functions differently. At EOD, clocked in employees are clocked out. Employees do not appear on the Edit Punches screen.

Can Edit Clock In/Out — Enables the clock in and clock-out times to be edited from an order entry terminal by a manager.

No PTD Hours on Clockout Chit — Suppresses the accumulated hours line on the clockout chit.

Use Edit Punch Reasons — Enables you to specify reasons for editing a punch from the BOH and FOH. Edit Punch reasons are defined in Maintenance > Labor > Edit Punch Reasons and appear for each punch on the Edit Punches report.

Enable Enforcement of Unpaid Break Returns — Activates the enforcement of unpaid break times an employee takes to a set break time frame. If an employee returns from a break too early, a manager can override the enforcement and allow the employee to return to work. This setting also enables the 'Approve Break Return Options' inset, the 'Enforce __ Minute Breaks' check box in Maintenance > Labor > Job Codes, and the 'Approve Unpaid Break Returns' check box in Maintenance > Labor > Access Levels.

Approve Break Return Options Inset

Select at least one of the following check boxes pertaining to returning from an unpaid break.

Keep Break as an Unpaid Break — Retains the break as unpaid. Select this to display the 'Keep Break as Unpaid Break' button on the FOH screen that displays for a manager override.

Convert Break into a Paid Break — Changes the unpaid break to a paid break. Select this to display the 'Convert Break into a Paid Break' button on the FOH screen that displays for a manager override.

Remove Break — Removes the break time. Select this to display the ‘Remove Break’ button on the FOH screen that displays for a manager override.

Enforce Unpaid Break Time Feature

The Enforce Unpaid Break Time feature enables you to enforce the unpaid break time an employee takes to a set break time frame, based on a defined number of minutes. If the employee returns from an unpaid break too early, the manager can override the enforcement and allow the employee to return to work. We discuss the following procedures for the Enforce Unpaid Break Time feature:

- Activate the Enforce Unpaid Break Time feature and select approve break return options.
- Define the number of minutes to enforce unpaid breaks.
- Define who can approve an unpaid break return.
- Operate the Enforce Unpaid Break Time feature from the FOH.

Approve break return options enable you to control how the break is recorded, or if it should be paid or unpaid. You must select at least one approve break return option or the system will not save your information. With each selection, the option appears on the FOH Break Options (manager override) screen when the employee returns from a break too early. If you select only one option, the override screen does not appear.

To activate the Enforce Break Time feature and select approve break return options to appear on the manager override screen:

1. Select **Maintenance > Store Settings**. The Store Settings function tab appears.
2. Select **Labor** from the Group drop-down list.
3. Select the **Employee Settings** subtab.
4. Select **Enable Enforcement of Unpaid Break Returns**.
5. Select at least one from the **Keep Break as an Unpaid Break**, **Convert Break into a Paid Break**, and **Remove Break** options.
6. Click **Save**.

You must define the number of minutes an employee can take for an unpaid break. A manager can override the return if an employee returns from a break early.

To define the number of minutes for an unpaid break:

1. Select **Maintenance > Labor > Job Codes**. The Job Codes function tab appears.
2. Select the **job code** for which the employee works with unpaid breaks from the Number drop-down list.
3. Select either **Allow Unpaid Breaks** or **Allow Meal Period Breaks**.
4. Select **Enforce __ Minute Breaks**.
5. Type the **number of minutes**, between 1 and 999, an employee must take for an unpaid break.
6. Click **Save**.

To override an early unpaid break return, a manager must have the ability to approve the return.

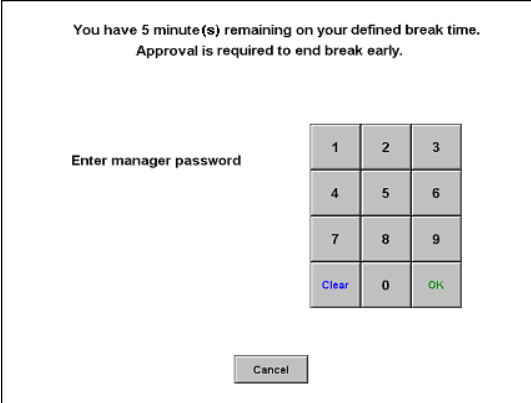
To define the access level to approve unpaid break returns:

1. Select **Maintenance > Labor > Access Levels**. The Access Levels function tab displays.
2. Select a **manager access level** from the Level drop-down list.
3. Select the **Employee subtab**.
4. Select **Approve Unpaid Break Returns**.
5. Click **Save**.

To override an early unpaid break return in the FOH:

1. Log in to the FOH after starting an unpaid break. The Clock In screen appears.

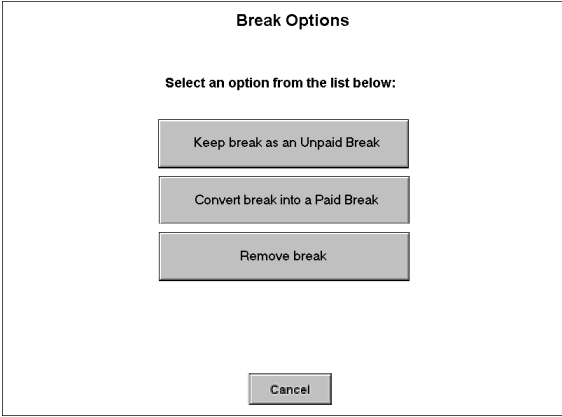
2. Touch End Break. The manager approval screen appears with the number of minutes remaining for the break, as shown in Figure 3-8:



The Manager Approval Screen displays a message at the top: "You have 5 minute(s) remaining on your defined break time. Approval is required to end break early." Below this, on the left, is the text "Enter manager password". To the right is a numeric keypad with buttons for digits 1 through 9, 0, a "Clear" button, and an "OK" button. At the bottom center is a "Cancel" button.

Figure 3-8 Manager Approval Screen

3. Enter a manager password using the numeric keypad and touch OK. The Break Options screen appears with the appropriate approve break return options, as shown in Figure 3-9:



The Break Options screen has the title "Break Options" at the top. Below it is the instruction "Select an option from the list below:". There are three buttons stacked vertically: "Keep break as an Unpaid Break", "Convert break into a Paid Break", and "Remove break". At the bottom center is a "Cancel" button.

Figure 3-9 Break Options Screen



If only one approve break option is configured, then this screen does not display.

4. Touch one of the following available approved break return options to return from the break and begin ordering:

Keep Break as an Unpaid Break — Leaves the employee's break as an unpaid break for the time frame that the employee took the break. For example, if the employee began the break at 11:00 a.m., and the manager selects this option at 11:20 a.m., the system keeps the break as an unpaid break with a time frame of 20 minutes.

Convert Break into a Paid Break — Nullifies the unpaid break and adds a paid break for the time frame that the employee took the break. For example, if the employee took the break at 11:00 a.m., and the manager selects this option at 11:20 a.m., the system creates a paid break with a time frame of 20 minutes.

Remove Break — Nullifies the unpaid break. For example, if the employee began the break at 11:00 a.m., and the manager selects this option at 11:20 a.m., the system removes the unpaid break and makes no other changes.



An exception occurs when converting an unpaid break to a paid break for an employee clocked in with a job code that does not allow paid breaks. An error message appears and the manager must select a different option.

Clock In/Out Subtab

This subtab enables you to set labor reporting options, overtime calculations, and clock in/out rounding. Select the Clock In/Out subtab from the Labor group, as shown in Figure 3-10:

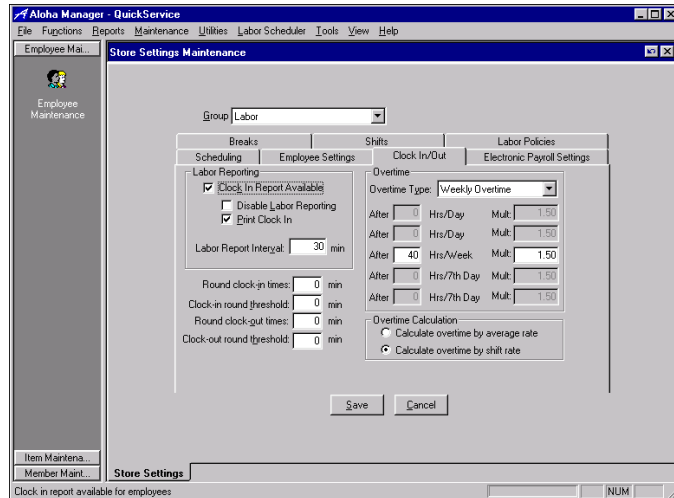


Figure 3-10 Labor Group, Clock In/Out Subtab

Labor Reporting Inset

Clock In Report Available — Enables the employee to view the clock in report from a FOH terminal.

Disable Labor Reporting — Disables labor reporting functions in both the FOH and BOH. When this check box is selected, no clock in or clock-out chits will print. Also, labor figures are not included in the Restaurant Sales report for the FOH. This option is used in some international operations.

Print Clock In — Prints a clock in receipt for each employee.

Labor Report Interval — Denotes the time interval (in minutes) that the FOH Labor Report is calculated. Labor costs are reported in increments of this interval.

Round Clock-In Times — Specifies the number of minutes in which to round clock in times. When employees clock in, the time is rounded according to the number entered in this field. For example, if '5' is entered, and an employee clocks in at 7:58, the system rounds the time to the nearest 5-minute interval, which is 8:00. Enter '0' for no rounding.

Clock-In Round Threshold — Specifies the number of minutes at which the system rounds up the clock in time. If set to zero, the system automatically rounds down to the nearest time interval listed in 'Round clock in times'.

Round Clock-Out Times — Specifies the number of minutes in which to round clock out times. When employees clock out, the time is rounded according to the number entered in this field. Enter '0' for no rounding.

Clock-Out Round Threshold — Specifies the number of minutes at which the system rounds down the clock out time. If set to zero, the system automatically rounds up to the nearest time interval listed in 'Round clock out times'.

Overtime Inset

Overtime Type — Specifies the overtime type used by the policy of the company. Select from three different types; Weekly Overtime, Daily Overtime, and Extended Daily Overtime. Depending upon which type you select, the applicable hours and multiplier text boxes are highlighted for entry.

After __ Hrs/Day — Denotes the number of hours an employee can work per day before going into overtime. The second After __ Hrs/Day text box must be greater than or equal to the number of hours in the first text box.

After __ Hrs/Week — Denotes the number of hours an employee can work per week before going into overtime. This is typically set to 40.

After __ Hrs/7th Day — Denotes the number of hours an employee can work on the 7th consecutive day worked before going into overtime, if applicable. The second After __ Hrs/7th Day text box must be greater than or equal to the number of hours in the first text box. Employees receive overtime pay for the 7th consecutive day worked, regardless of the number of hours worked that same week. After a defined number of hours are worked on the 7th consecutive day, employees can receive additional overtime pay.

For example, an employee who worked five hours a day for seven days, and using 1.5 as the overtime multiplier rate, the overtime is calculated as follows:

Number of Hours	Rate of Pay	Overtime Rate	Total Pay
30.0 hours	\$5.00		\$150.00
5.0 hours	\$7.50	1.5	\$37.50

If that same employee worked 10 hours on the 7th consecutive day worked, using 2.0 as the additional overtime multiplier rate, overtime is calculated as follows:

Number of Hours	Rate of Pay	Overtime Rate	Total Pay
30.0 hours	\$5.00		\$150.00
8.0 hours	\$7.50	1.5	\$60.00
2.0 hours	\$10.00	2.0	\$20.00

Mult — Specifies the multiplier rate used by the system when an employee's hours exceed the hours per day and/or the hours per week limits. Typically, the rate is 1.5.

Overtime Calculation Inset

Calculate Overtime by Average Rate — Calculates employee's overtime pay by that employee's total pay earned for all shifts worked during the current pay period, divided by the employee's total hours worked for all shifts during the current pay period.

Calculate Overtime by Shift Rate — Calculates employee's overtime pay by the shift rate of the job code the employee is logged in as when overtime begins accumulating.

Electronic Payroll Settings Subtab

This subtab enables you to create a file for ADP or other third party software to read and process for payroll processing. Select the Electronic Payroll Settings subtab from the Labor group, as shown in Figure 3-11:

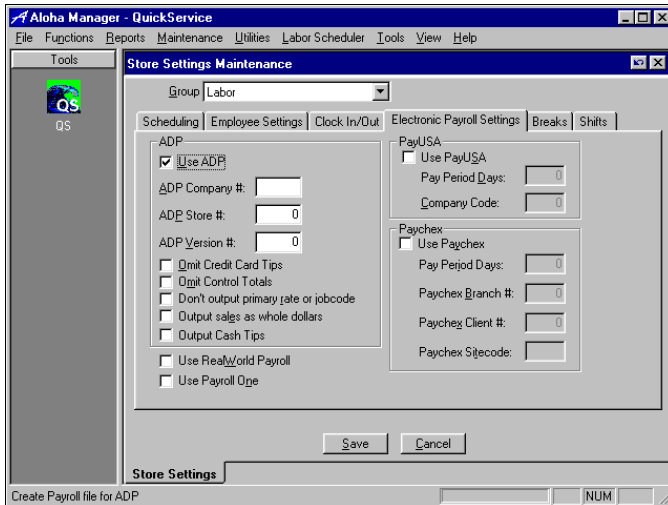


Figure 3-11 Labor Group, Electronic Payroll Settings Subtab

ADP Inset

Use ADP — Specifies ADP as the third party payroll processor you are using.

ADP Company # — Represents the 3-digit ADP company number. This number must be obtained from ADP.

ADP Store # — Represents the ADP store number. This number is obtained from ADP, and is for use by chain operations only.

ADP Version # — Represents the ADP software version number. This number must be obtained from ADP.

Omit Credit Card Tips — Eliminates credit card tips from the ADP export file.

Omit Control Totals — For early versions of ADP software that do not support these fields.

Don't Output Primary Rate or Job Code — Excludes pay rates and job codes from the export file.

Output Sales as Whole Dollars — Discloses sales in rounded, whole dollar amounts, rather than exact dollar and cent amounts.

Output Cash Tips — Includes cash tips in the ADP export file.

Use RealWorld Payroll — Specifies RealWorld Payroll as the third party payroll processor you are using.

Use Payroll One — Specifies Payroll One as the third party payroll processor you are using.

PayUSA Inset

Use PayUSA — Specifies PayUSA as the third party payroll processor you are using.

Pay Period Days — Represents the number of days in a PayUSA pay period. PayUSA currently requires this number be either 7 or 14.

Company Code — Represents the assigned company code obtained from PayUSA.

Paychex Inset

Use Paychex — Specifies Paychex as the third party payroll processor you are using.

Pay Period Days — Specifies the number of days in a Paychex pay period.

Paychex Branch # — Represents the Paychex branch number. This is a number from 0 - 999. Use leading zeros if the branch number is less than three digits long.

Paychex Client # — Represents the four-digit (0 - 9999) Paychex client number.

Paychex Sitecode — Represents the single-character Paychex site code. The site code is a code assigned to each location from which Paychex payroll data is exported.



If using Paychex, an Export ID must be assigned to each employee in Maintenance > Labor > Employees.

Breaks Subtab

This subtab allows you to enable meal period and rest period break rules and set the parameters for those rules. If all criteria is met according to the parameters, the system automatically generates a pay record in Other Wages when End-of-Day is run. This record is identifiable as system-generated and can either be accepted or deleted when the Other Wages section is reviewed by the manager. The system generated records for breaks are:

- Rest Period Premium
- Meal Period 1 Consent
- Meal Period 1 Mandatory
- Meal Period 2 Consent
- Meal Period 2 Mandatory

‘Meal Period 1’ refers to the period you designate for a typical meal period during the first shift of a work day. ‘Meal Period 2’ refers to a meal period typically worked on a second shift or extended work day, based on pre-defined parameters set in the system. ‘Consent’ refers to rules for meal periods that may be waived when, for example, the employee’s work day will be completed in less than a pre-defined and mutually agreed upon time. ‘Mandatory’ refers to rules that require mandatory pay for meal periods because maximum requirements are met.



Refer to the Other Wages section of Chapter 2, Functions, for more information on Other Wages pay.

Select the Breaks subtab from the Labor group, as shown in Figure 3-12:

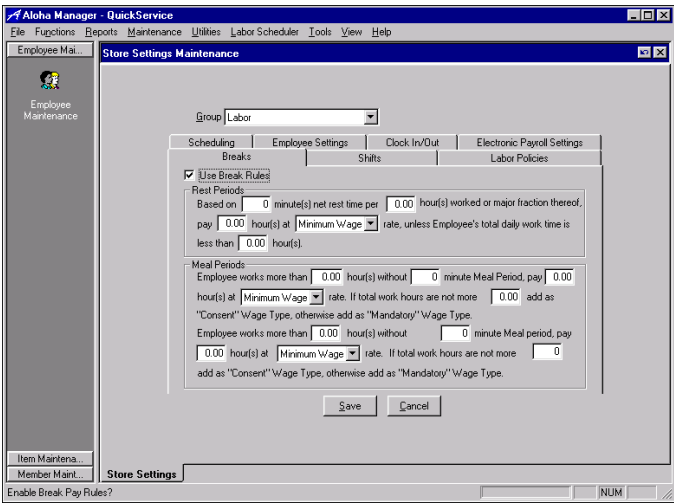



Figure 3-12 Breaks Subtab

Use Break Rules — Enables you to specify the parameters to apply to break rules.



Check the wage and payday laws for your state to ensure your policies and procedures are in compliance.

Rest Periods Inset

The rest period rule enables you to pay an employee for a rest period, when the defined criteria is met.

Rest Period net rest time minute(s) — Represents number of minutes of net rest time per set number of hours worked. A valid range is 1 to 59.

Rest Period hour(s) worked — Represents number of hours worked as basis for set number of rest time minutes. A valid range is 1.00 to 24.00.

Rest Period pay hours — Represents the number of hours added as Other Wages if the employee is furnished less than set number of minutes of rest period per set number of hours worked. A valid range is 1.00 to 24.00.

Rest Period pay rate — Represents the rate of pay if employee does not receive rest period break. The default is the regular rate of pay. Minimum wage is an option.



Refer to the Other Wages section of Chapter 2, Functions, for more information on Other Wages pay.



The minimum wage rate can be set in Store Settings > Labor group > Employee Settings subtab.

Rest Period total work time — Represents minimum total work time required to receive a rest period break. A valid range is 1.00 to 24.00.

The following table shows examples of results generated by the criteria you may set for rest periods:

Criteria:	
10 minute net rest time for every 4 hours worked, 1 hour paid at Regular rate, unless shift ends at less than 3.5 hours.	
Scenario:	Result:
Bob works 3.25 hours.	Bob gets paid actual hours worked.
Bob works 3.75 hours.	Bob gets paid actual hours worked plus 1 hour of Rest Period bonus at the regular rate, since he was not given a Rest Period break. The system generates an Other Wages entry as “System-Rest Period Premium.”
Bob works 4.00 hours.	Bob gets paid actual hours worked plus 1 hour of Rest Period bonus at the regular rate, since he was not given a Rest Period break. The system generates an Other Wages entry as “System-Rest Period Premium.”

Figure 3-13 Rest Period Table

Meal Periods Inset

The meal period rule enables you to pay the employee for a first and/or second meal period, when the defined criteria is met.

First Meal Period

Meal period work hours — Represents the minimum number of hour(s) required to work before a meal break. If the employee works more than this set number of hours without a first meal period break of a set number of minutes, add additional hour(s) as Other Wages. A valid range is 1.00 to 24.00.

Meal period break length — Represents the length of the first meal period break in minutes for a set number of hours worked. A valid range is from 1.00 to 24.00.

Meal period pay hour(s) — Represents the number of hour(s) entered as Other Wages if the employee works more than a set number of hours without a first meal period break for a set number of minutes. A valid range is 1.00 to 24.00.

Meal period pay rate — Represents the rate of pay if the employee does not receive first meal period break. The default is the regular rate of pay. Minimum wage is an option.

Add as ‘Consent’ wage type — Represents the maximum number of hour(s) worked before meal pay is mandatory. If the employee’s total work hours are less than or equal to this number of hours, post the hour(s) as a ‘consent’ type of wage in Other Wages. A valid range is 1.00 to 24.00.

The table in Figure 3-14 shows examples of results generated by the criteria you may set for *first* meal periods:

Criteria:	
Employee works more than 5 hours without a 30 minute meal break, pay 1 hour at regular rate. If total contiguous paid hours are less than 6 hours, extra pay can be waived.	
Scenario:	Result:
Bob works 4.75 hours without a meal break.	Bob gets paid actual hours worked only.
Bob works 5 hours without a meal break.	Bob gets paid actual hours worked plus 1 hour of Meal Period pay. The system generates an Other Wages entry as “System-Meal Period 1 Consent.”
Bob works 6.00 hours without a meal break.	Bob gets paid actual hours worked plus 1 hour of Meal Period pay. The system generates an Other Wages entry as “System-Meal Period 1 Consent.”

Figure 3-14 First Meal Period Table



In the table in Figure 3-14, employee and employer can mutually consent to waive the first meal period, if the employee’s work period of not more than six hours will complete his day’s work.

Second Meal Period

Meal period work hour(s) — Represents the minimum number of hour(s) required to work before a second meal break. If the employee works more than this set number of hours without a second meal period break of a set number of minutes, add additional hour(s) as Other Wages. A valid range is 1.00 to 24.00.

Meal period break length — Represents the length of the second meal period break in minutes for a set number of hours worked. A valid range is 30 to 59.

Meal period pay hour(s) — Represents the number of hour(s) entered as Other Wages if the employee works more than a set number of hours without a second meal period break for a set number of minutes. A valid range is 1.00 to 24.00.

Meal period pay rate — Represents the rate of pay if the employee does not receive a second meal period break. The default is the regular rate of pay. Minimum wage is an option.

Add as ‘Consent’ wage type — Represents the maximum number of hour(s) to work before meal pay is mandatory. If employee’s total work hours are less than or equal to this number of hours, post the hour(s) as a ‘consent’ type of wage in Other Wages. A valid range is 1.00 to 24.00.

The following table shows examples of results generated by the criteria set for *second* meal periods:

Criteria:	
Employee works more than 10 hours without a <i>second</i> 30 minute meal break, pay 1 hour at regular rate. If the total contiguous paid hours are less than 12 hours, extra pay can be waived.	
Scenario:	Result:
Bob works 9.5 hours with-out a meal break.	Bob gets paid actual hours worked plus 1 hour of Meal Period 1 pay. The system generates an Other Wages entry as ‘System-Meal Period 1 Mandatory’.
Bob works 11.5 hours.	Bob gets paid actual hours worked plus 1 hour of Meal Period 1 pay plus one hour of Meal Period 2 pay. The system generates an Other Wages entry as ‘System-Meal Period 1 Man-datory’ and another as ‘System-Meal Period 2 Consent’.

Bob works 4.75 hours, takes a meal break, then works 4.75 hours without a second meal break.	Bob gets paid actual hours worked only.
Bob works 4.75 hours, takes a meal break, then works 6.0 hours.	Bob gets paid actual hours worked plus 1 hour of Meal Period 2 pay. The system generates an Other Wages entry as 'System-Meal Period 2 Consent'.

Figure 3-15 Second Meal Period Table



In the examples in Figure 3-20, employee and employer can mutually consent to waive the *second* meal period, if the employee's work period of not more than twelve hours completes his day's work. Meal Period 1 rules apply and are mandatory because total continuous hours in all instances exceed the threshold of six hours.

Shifts Subtab

This subtab allows you to enable and set parameters for split shift and shift pay rules. If all criteria is met, the system automatically generates a pay record in Other Wages when End-of-Day is run. This record is identifiable as system-generated and can either be accepted or deleted when the Other Wages section is reviewed by the manager. The system generated records for shifts are:

- Split Shift Premium
- Worked < half scheduled
- No Schedule minimum
- 2nd Shift minimum



See the Other Wages section of Chapter 2, Functions, for more information on Other Wages pay.

Select the Shifts subtab from the Labor group, as shown in Figure 3-16:

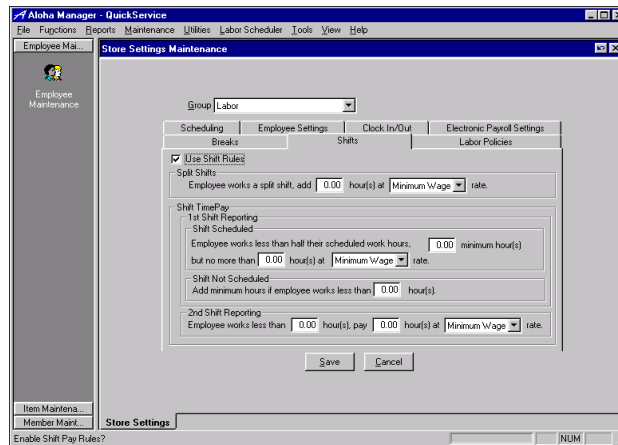


Figure 3-16 Shifts Subtab

Use Shift Rules — Enables you to specify parameters to apply to the shift rules.



Check the wage and payday laws for your state to ensure your policies and procedures are in compliance.

Split Shifts Inset

The split shifts rule enables you to pay an additional wage if an employee works a split shift, when the defined criteria is met. A split shift is recognized as two clock in/clock outs in one work day. The references to '1st reporting' and '2nd reporting' that follow refer to an employee's 1st shift and 2nd shift.

Split Shift hour(s) — Represents the number of hours added as Other Wages if the employee has worked one shift and works a second shift in one work day. Valid entries are from 1.00 to 24.00.

Split Shift pay rate — Represents the rate of pay if the employee works a split shift. Minimum wage is an option. If the ‘regular pay’ option is selected, the rate will be for the job worked on the first shift.



Your minimum wage rate can be set in Store Settings > Labor group on the Employee Settings subtab.

The following table shows examples of results generated by criteria you may set for split shifts:

Criteria:	
Pay 1 hour at minimum pay rate.	
Scenario:	Result:
Bob works 1st shift for 3 hours as a cook at \$10 hour, and 2nd shift for 2 hours as a dishwasher for \$6 an hour.	Bob is paid 3 hours times \$10, plus 2 hours times \$6, plus 1 hour times minimum wage. The extra hour pay does not count toward overtime. The system generates an Other Wages entry as ‘System-Split Shift Premium’.

Figure 3-17 Split Shift #1 Table

Criteria:	
Pay 1 hour at regular pay rate.	
Scenario:	Result:
Bob works 1st shift for 3 hours as a cook at \$10 hour, and 2nd shift for 2 hours as a dishwasher for \$6 an hour.	Bob is paid 3 hours times \$10, plus 2 hours times \$6, plus 1 hour times \$10.00, since his regular pay for 1st shift is \$10.00. The extra hour pay does not count toward overtime. The system generates an Other Wages entry as ‘System-Split Shift Premium’.

Figure 3-18 Split Shift #2 Table

Shift TimePay - 1st Shift Reporting Inset

The first shift reporting rule is that if an employee works less than half the scheduled hours, the employee is paid additionally for half the scheduled hours at the regular rate of pay. When this condition is met, the system generates an Other Wages entry with the wage type 'System - Worked < half scheduled.'



The system has only one option to compute whether an employee has worked at least half of the hours scheduled. The 'Use Schedule' check box must be selected in Maintenance > Store Settings > Labor group > Scheduling subtab.

Shift Scheduled

Pay at least hours — Represents the *minimum* number of hour(s) to add as Other Wages if the employee works less than half their scheduled hours on first reporting. A valid range is 1.00 to 24.00.

No more than hours — Represents the *maximum* number of hours to add as Other Wages if the employee works less than half their scheduled hours on first reporting. A valid range is from 1.00 to 24.00, *but this value cannot be less than the minimum value.*

Pay Rate — Represents the rate at which the employee is paid. The default value is regular pay. Minimum wage is an option.

The following table shows examples of results generated by criteria you may set for split *first* shifts:

Criteria:	
Pay 2 hours minimum and 4 hours maximum at regular pay rate.	
Scenario:	Result:
Bob is scheduled to work 4 hours, but works 3.	Bob is paid for his actual hours worked, since he worked more than half his scheduled shift.
Bob is scheduled to work 6 hours, but works 2.5.	Bob is paid for his actual hours worked, plus 3 additional hours, for a total of 5.5 hours. The 3 hours is due to the fact that he was scheduled for 6, half of which is 3. He received the 3 since he did not work at least that many. The system generates an Other Wages entry as 'System Worked < half scheduled'.
Bob is scheduled to work 4 hours, but works 1.75.	Bob is paid for his actual hours worked, plus 2 hours for working less than half his scheduled shift, for a total of 3.75 hours. The system generates an Other Wages entry as 'System Worked < half scheduled'.

Figure 3-19 Split First Shift Table

Shift Not Scheduled

Minimum hours — Represents the minimum hour(s) to pay if the employee is not scheduled to work. A valid range is 1.00 to 24.00.

The following tables show examples of results generated by criteria you may set for split shifts:

Criteria:	
System is set to pay 2 hours minimum , 4 hours maximum at regular pay rate, but the employee does not have a schedule .	
Scenario:	Result:
Bob is not scheduled and works 4 hours.	Bob is paid 4 hours at the job code rate.
Bob is not scheduled and works 6 hours.	Bob is paid 6 hours at the job code rate.
Bob is not scheduled and works 3 hours.	Bob will be paid 3 hours at the job code rate, plus 2 additional system generated hours at the job code rate. The system generates an Other Wages entry as 'System-No schedule minimum'.

Figure 3-20 No Scheduled Shift #1 Table

Criteria:	
System is set to pay 2 hours minimum , 4 hours maximum at minimum wage , but the employee does not have a schedule .	
Scenario:	Result:
Bob is not scheduled and works 4 hours.	Bob is paid 4 hours at the job code rate.
Bob is not scheduled and works 6 hours.	Bob is paid 6 hours at the job code rate.
Bob is not scheduled and works 3 hours.	Bob will be paid 3 hours at the job code rate, plus 2 additional system generated hours at the minimum wage rate. The system generates an Other Wages entry as 'System-No schedule minimum'.

Figure 3-21 No Scheduled Shift #2 Table

Shift TimePay - 2nd Shift Reporting Inset

The second shift reporting rule is that if an employee reports to work for a second shift of a day and works less than a pre-defined amount of hours, the employee should be paid a pre-defined amount of hours at the regular rate of pay or minimum wage. This rule does not rely on the 'Use Schedule' check box, but rather checks clock ins and clock outs within a work day. When conditions are met, the system generates an Other Wages entry with the wage type 'System - 2nd Shift minimum.'

Works less than hours — Represents the threshold number of hours the employee must work less than on second shift to be eligible for additional pay. A valid range is 1.00 to 24.00.

Reporting pay hours — Represents the number of hours to add to Other Wages if the employee works less than the threshold hours on second shift. A valid range is 1.00 to 24.00.

Reporting pay rate — Represents the rate of pay for additional hours if employee is not furnished the set number of hours on his second shift. The default is the regular rate of pay. Minimum wage is an option.

The following table shows examples of results generated by criteria you may set for split *second* shifts:

Criteria:	
Employee works second shift less than 2 hours. Pay 2 hours at minimum pay rate or regular rate.	
Scenario:	Result:
Bob returns for his second shift. He clocks in and is immediately sent home.	Bob gets paid actual time worked plus 2 hours either minimum wage or regular rate. The system generates an Other Wages entry as ‘System- 2nd Shift minimum’.
Bob returns for his second shift. He works 1.5 hours and is sent home.	Bob gets paid the 1.5 hours he worked plus 2 hours at either minimum wage or his regular rate. The system generates an Other Wages entry as ‘System- 2nd Shift minimum’.
Bob returns for his second shift. He works 3 hours and is sent home.	Bob gets paid his actual hours worked only since he worked more than the threshold.

Figure 3-22 Split Second Shift Table

Labor Policies Subtab

This feature is available if you are using Aloha Labor Scheduler. Refer to the Aloha Labor Scheduler manual for more information about Labor Policies.

Financials

The Financials group enables you to establish policies for gratuity, taxes, reports, house accounts, and members. To access the store settings for Financials, select Maintenance > Store Settings. Select Financials from the Group drop-down list. The corresponding subtabs display, with Taxes & Surcharges as the default subtab, as shown in Figure 3-23:

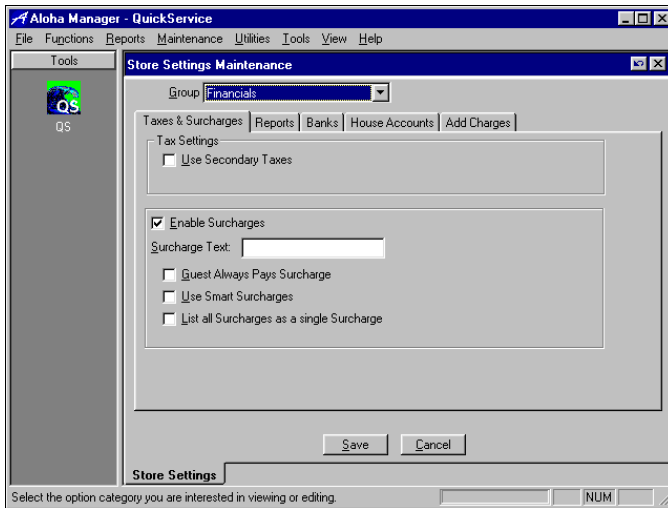


Figure 3-23 Taxes & Surcharges Subtab

The Financials group provides the following subtabs: Taxes & Surcharges, Reports, Banks, House Accounts, and Add Charges.

Taxes & Surcharges Subtab

This subtab enables you to select to use secondary or smart taxes, and to enable surcharges.

Tax Settings Inset

Use Secondary Taxes — Enables the use of secondary taxes by the system. If you associate any secondary taxes to an item in Maintenance > Menu > Items, then you must select this setting.

Enable Surcharges Inset

Enable Surcharges — Activates surcharges in the system and applies them to the designated menu items. Surcharges must first be created and defined in Maintenance > Menu > Surcharges.

Surcharge Text — Specifies the text to display on guest checks when 'Enable Surcharges' is selected.

Guest Pays Surcharge — Applies surcharges to designated menu items and includes them on guest checks.

Use Smart Surcharges — Indicates smart surcharges are in use.

List All Surcharges as a Single Surcharge — Combines all surcharges into a single entry on guest checks. If not selected, surcharges are listed separately each time they are applied.

Reports Subtab

This subtab enables you to select to include comps and promos in net sales, and to exclude open sales on the net server report. Select the Reports subtab from the Financials group, as shown in Figure 3-24:

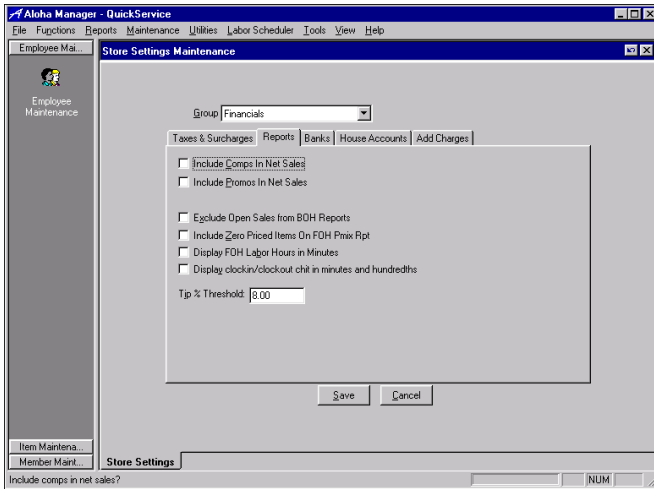


Figure 3-24 Financials Group, Reports Subtab

Include Comps in Net Sales — Includes comp sales in the net sales amount.

Include Promos in Net Sales — Includes promo sales in the net sales amount.

Exclude Open Sales from BOH Reports — Open check sales are not included in the calculation of BOH reports. Only sales that are finalized are included in the reports.

Include Zero Priced Items on FOH Pmix Rpt — Items with a price of \$0.00 are included on the FOH Product Mix report.

Display FOH Labor Hours in Minutes — Controls display of hours and minutes on FOH reports for Clock In/Out Times and the Labor report. When this check box is cleared, which is the default setting, the hours display in a decimal, or hundredths, format.

Display clock in/clock out chit in minutes and hundredths — Controls display of hours and minutes on the clock in/clock out chit. When this check box is cleared, which is the default setting, the times display in hours and minutes, or HH:MM. If selected, times and totals print in the HH:MM format *and* in hundredths, or decimals.

Tip% Threshold: — Specifies the percentage to use when determining if an employee's declared tips are too low. This works in conjunction with the 'Must Declare Tips' and 'Display Threshold Message' check boxes located on the Job Codes subtab in Maintenance > Labor > Job Codes.



The employee receives only one chance to enter their declared tips at the right percentage. Should the amount be too low, a warning message displays. The manager must delete the employee's clock out to enable them to try again.

Banks Subtab

The Banks subtab enables you to define cash drop thresholds to use to prompt the cashier when it is time to pull money from the drawer and place it in the safe. You set the amount you want them to drop for the initial prompt and subsequent prompts. The system checks at log in and after a tender is applied. If the criteria is met, a message displays at this time. These do not force the cashier to do the drop. You also set the amount at which a drop is required. At

this point, the cashier has to select a cash drawer function and perform a drop. Select the Banks subtab, as shown in Figure 3-25:

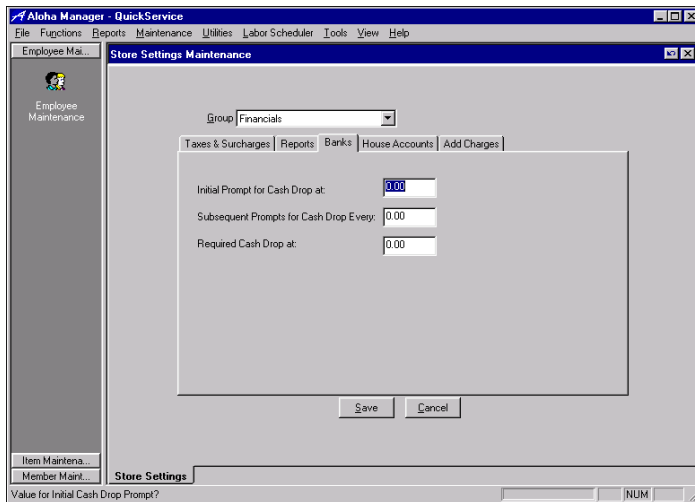


Figure 3-25 Banks Subtab

Initial Prompt for Cash Drop at — Designates the amount that must be in the drawer to initiate the first message prompt for a cash drop.

Subsequent Prompts for Cash Drop Every — Determines the amount that must be in the drawer to display subsequent message prompts for a cash drop. This number must be greater than the number entered in the ‘Initial Prompt for Cash Drop’ text box.

Required Cash Drop at — Designates the amount that must be in the drawer to display a message prompt for a required cash drop. This number must be greater than the numbers entered in the ‘Initial Prompt for Cash Drop’ and ‘Subsequent Prompts for Cash Drop Every’ text boxes.

House Accounts Subtab

This subtab enables you to specify how the system searches for house accounts. Select the House Accounts subtab from the Financials group, as shown in Figure 3-26:

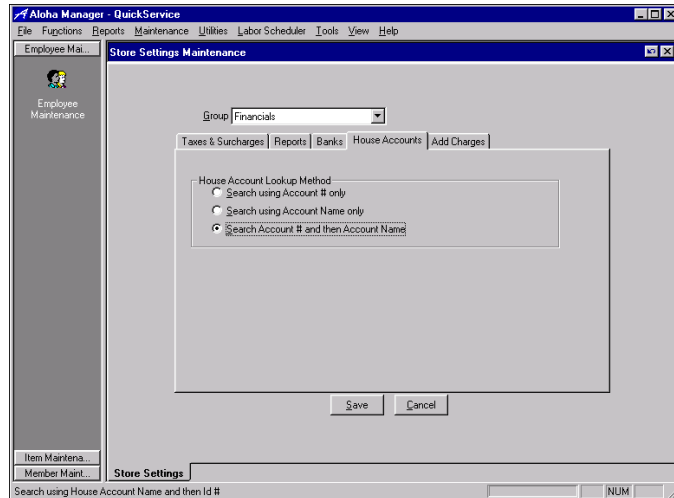


Figure 3-26 Financials Group, House Accounts Subtab

House Account Lookup Method Inset

Search Using Account # Only — Searches for house accounts by account number.

Search Using Account Name Only — Searches for house accounts by the account name.

Search Account # and Then Account Name — Searches for house accounts by the account number, then if nothing is found, searches for the account name.

Add Charges Subtab

The additional charge feature enables you to add one flat or percentage charge to a guest check. In addition, you can exempt one category, or you can exclude additional charges when using specific order modes.

CAUTION *If you select a category on the Add Charges subtab, the items sold from that category are exempt from the additional charge.*

Select the Add Charges subtab from the Financials group, as shown in Figure 3-27:

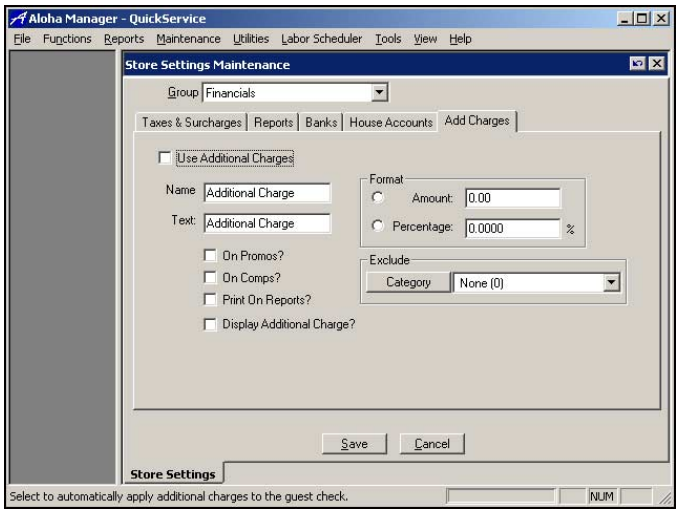


Figure 3-27 Add Charges Subtab

Use Additional Charges — Enables additional charges be applied automatically to the guest check per the defined criteria. Once selected, the system checks for an *inclusive* GST tax. If one is used, the system selects and disables both the ‘On Comps’ and ‘On Promos’ text boxes and adds additional charges to the full item prices. In addition, the system disables the ‘Amount’ text box so that you may not use a flat rate for the additional charge. If ‘Use Additional

Charges' is not selected, the additional charge does not appear on FOH or BOH reports.



The GST tax is the only tax that may be applied to an additional charge.

Name — Denotes the name of the additional charge.

Text: — Determines the text to print on the guest check when the additional charge is added. For example, you may wish to print 'Service Charge' as the description on the guest check, rather than 'Additional Charge'.

On Promos? — Indicates whether the additional charge is applied to promo(s). If selected, the additional charge is applied to the subtotal of the guest check, including the amount of the promo(s). If 'Amount' is selected, the check box becomes disabled and you are unable to change the setting while a fixed amount is used. If you change the setting to a percentage at a later time, the check box becomes fully enabled again.

On Comps? — Indicates whether the additional charge is applied to comp(s). If selected, the additional charge is applied to the subtotal of the guest check, including the amount of the comp(s). If 'Amount' is selected, the check box becomes disabled and you are unable to change the setting while a fixed amount is used. If you change the setting to a percentage at a later time, the check box becomes fully enabled again.

Print on Reports? — Enables you to report additional charges on the FOH and BOH Sales and Sales by Revenue Center reports.

Format Inset

Amount — Displays a numeric value which represents the flat charge the system automatically adds to each guest check. The default value is 00000.00. If this check box is selected, the 'Percentage' text box is disabled.

Percentage — Displays a numeric value which represents the multiplier used in concert with the subtotal on the guest check. The default is 00.0000. If this check box is selected, the 'Amount' text box is disabled.



For more information on excluding additional charges in specific order modes, refer to Chapter 7, System Maintenance Functions, Order Modes.

Category Button

Click Category to access the Categories function tab. Here you perform maintenance in the Categories function, including adding new records, if needed.

Category drop-down list — Designates a category to *exempt* from the additional charge.



If you select a category on the Add Charges subtab, the items sold from that category are exempted from the additional charge.

Printing

The Printing group enables you to set up various check print styles and content, as well as employee checkout configuration and report settings. To access the Printing group options, select Maintenance > Store Settings. Select Printing from the Group drop-down list. The corresponding subtabs display, with Check Content 1 as the default subtab.

Check Content 1 Subtab

The Check Content 1 subtab, as shown in Figure 3-28, enables you to select subtotals and totals that print on guest checks.

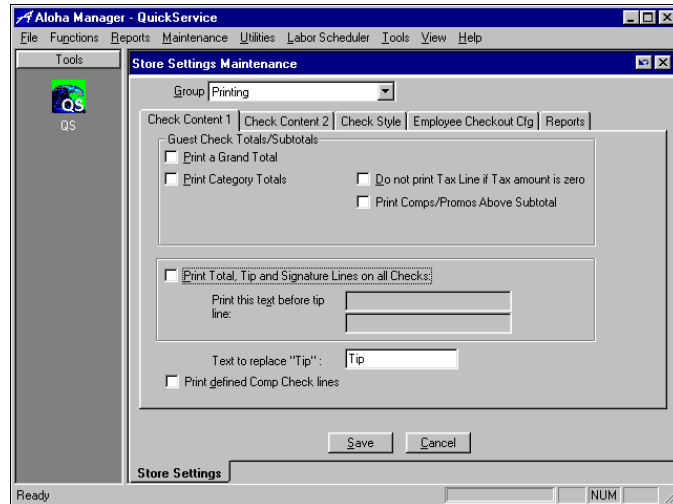


Figure 3-28 Printing Group, Check Content1 Subtab

Guest Check Totals/Subtotals Inset

Print a Grand Total — Enables the grand total, including the total, gratuity, and tips, to print on the closed guest check.

Print Category Totals — Prints sales category totals (subtotal and grand total) for each category that is rung up.

Do Not Print Tax Line if Tax Amount is Zero — Omits the tax line from the guest check if there are no taxes on the check.

Print Comps/Promos Above Subtotal — Prints comp and promo information before the subtotal.

Print Total, Tip and Signature Lines on All Checks — Adds the Total, Tip, and Signature lines to the guest check.

Print This Text before Tip Line — Enter the desired text to display before the tip line in the lines provided. For example: *If Paying by Credit Card Enter Tip and Total Here.*

Text to Replace Tip — Replaces the tip line text instead of the standard Tip line on the guest check.

Defining Comp Information to Print on Guest Check

Print Defined Comp Check Lines — Enables defined information, using a text file, to print with a guest check when a comp is applied. The printed message can be different based on the applied comp. Use this for record keeping purposes in restaurants that require a manager to complete a short form for each check containing a comp.

The comp form only prints when the check is closed and when you apply a comp to the check. Configure the comp form layout by creating a text file titled COMPFORM.TXT in the \DATA folder. Only one instance of the comp form prints per check. For example, if you apply the same comp to a check twice, the comp form prints one time.

The system also supports multiple comp forms. Rather than have a COMPFORM.TXT, which prints any time you apply a comp to a check, you can configure multiple comp forms titled, CPFnnnnn.TXT, where nnnnn is the ID number of the comp. For example if you apply comp ID 101 to a check, and CPF101.TXT is found in the \DATA folder, CPF101.TXT prints. In the event a comp ID number does not have a corresponding comp form file, COMPFORM.TXT prints.

Use the following rules when adding content to COMPFORM.TXT:

- Start each line with 'MSG'. All other lines are ignored.
- Insert an '&' in the fifth text line position (MSG plus one space) to instruct the printer to perform a partial cut (if the printer is capable).
- Insert a '^' in the fifth text line to insert the system date and the check number on the left side of the form. This uses a *yyyymmdd* – 99999 format (for example, 20010606 – 10001).
- Insert an '@' in the fifth text line to instruct the printer to start using a large font.
- Insert an '#' in the fifth text line to instruct the printer to stop using a large font.
- If the printed guest check is set to use the large font, then the comp form will default to the large font. You must use a '#' at the beginning of the form to default to the smaller font.
- Since the paper cutter on the printer is not at the same location as the print head, paper cuts may appear several lines above the location defined in COMPFORM.TXT. You will have to experiment with your printer type and compensate for this in your comp form design.

The following is an example of a COMPFORM.TXT:

```
MSG      &
MSG
MSG      ^
MSG
MSG      @
MSG                               COMP SLIP
MSG
MSG      Restaurant: _____
MSG
MSG      Shift: _____
MSG      #
MSG
MSG      Check All That Apply and Print Name
MSG
MSG      ____ Customer Relations _____
MSG      Explanation: _____
MSG      _____
```

MSG			
MSG	<input type="checkbox"/> Executive Meal		
MSG	<input type="checkbox"/> Manager Meal		
MSG	<input type="checkbox"/> 50% Emp Meal		
MSG			
MSG	Date		20
MSG			
MSG	Description	Amount	
MSG			
MSG	Liquor		
MSG			
MSG	Beer		
MSG			
MSG	Wine		
MSG			
MSG	Food		
MSG			
MSG		Total	
MSG			
MSG			
MSG	Waitperson	Emp #	
MSG			
MSG			
MSG	Customer/Employee Signature		
MSG			
MSG			
MSG	Manager Signature		

Check Content 2 Subtab

The Check Content 2 subtab enables you to select additional items to print on guest checks. Select the Check Content 2 subtab from the Printing group, as shown in Figure 3-29:

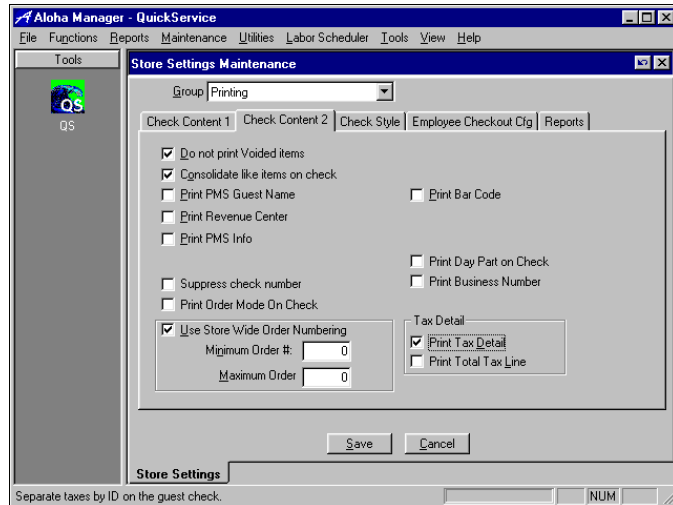


Figure 3-29 Printing Group, Check Content2 Subtab

Do Not Print Voided Items — Prevents voided items from printing on the guest check. If not selected, voided items are printed and shown as voided.

Consolidate Like Items on Check — Combines like items on guest checks. For example, if one guest orders a salad, and another guest orders a salad on the same check, the salads are listed as '2 Salads', rather than as separate line items.

Print PMS Guest Name — Prints the guest name on the guest check.

Print Revenue Center — Prints the revenue center on the guest check. This is useful for guests who want to remember from what area (bar, dining room, etc.) the check originated.

Print PMS Info — Prints the Room Number and Guest Name lines on the guest check. The guest can fill in this information when charging a meal to the room.



PMS options are used when the Aloha system interfaces with a hotel's property management system (PMS) and the PMS Interface product is installed.

Suppress Check Number — Disables the check number from printing on the guest check.



Suppressing the check number on the guest check disables competitors from learning the number of orders served within a given time period.

Print Order Mode on Check — Prints the order mode on the guest check.

Print Bar Code — Prints the order bar code on the guest check.

Print Day Part on Check — Prints the day part on the guest check.

Print Business Number — Prints the business number on the guest check.

Use Store Wide Order Numbering Inset

Use Store Wide Order Numbering — Numbers all checks consecutively.

Minimum Order # — Specifies the minimum order number to assign to a guest check. This is the starting order number at the beginning of each business day.

Maximum Order — Specifies the maximum order number to assign to a guest check.

Tax Detail Inset

Print Tax Detail — Prints and separates taxes by ID number on the guest check. When selected, the 'Print Total Tax Line' check box is enabled.

Print Total Tax Line — Prints a total of the detailed taxes directly below the tax detail on the guest check. This check box cannot be selected unless ‘Print Tax Detail’ is selected.

The sample guest checks shown in Figure 3-30 illustrate the tax detail print options. The guest check on the left was printed with ‘Print Tax Detail’ selected, and shows detail for food and alcohol taxes. The guest check on the right was printed with ‘Print Tax Detail’ and ‘Print Total Tax Line’ selected, and shows the same detail as the one on the left, with an additional line for the total of the two taxes.

Sample Restaurant	
Server: Aloha	01/03/2000
Table 12/1	10:04 AM
Guests: 8	10014
T-Bone Steak	16.95
Cherry Jubilee	4.75
Margarita	4.25
Michelob	3.50
Subtotal	29.45
Food Tax	1.63
Alcohol Tax	.74
Total Tax	2.37
Total	31.82
Thank You	

Sample Restaurant	
Server: Aloha	01/03/2000
Table 12/1	10:04 AM
Guests: 8	10014
T-Bone Steak	16.95
Cherry Jubilee	4.75
Margarita	4.25
Michelob	3.50
Subtotal	29.45
Food Tax	1.63
Alcohol Tax	.74
Total Tax	2.37
Total	31.82
Thank You	

Figure 3-30 Sample Guest Checks With Tax Detail

Check Style Subtab

The Check Style subtab enables you to specify font options, postfix and prefix lines, and auto-print checks. Select the Check Style subtab from the Printing group, as shown in Figure 3-31:

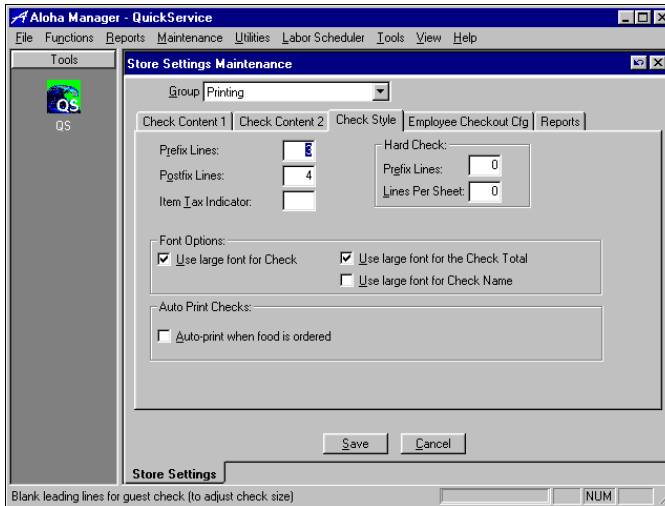


Figure 3-31 Printing Group, Check Style Subtab

Prefix Lines — Indicates the number of blank lines to appear at the top of the guest check. This positions the guest check on the page when it is printed.

Postfix Lines — Indicates the number of blank lines to appear at the bottom of the guest check.

Item Tax Indicator — Designates the character to print next to any taxable item on the guest check or receipt. This is a one-character field, and is useful in a retail environment when wanting to differentiate between taxable and nontaxable items.

Hard Check Inset

Prefix Lines — Specifies the number of lines to skip down when printing checks on a slip printer.

Lines Per Sheet — Specifies the total number of printable lines on the check, not including lines skipped, when printing checks on a slip printer.

Font Options Inset

Use Large Font for Check — Uses a larger font size on the guest check.

Use Large Font for the Check Total — Prints the guest check total in a larger font size.

Use Large Font for Check Name — Prints the guest check name in a larger font size.

Auto Print Checks Inset

Auto-Print When Food is Ordered — Enables guest checks to print automatically when food is committed to an order mode, or ‘sent to the kitchen’.

Multi-Part Checks Subtab

The Multi-Part Checks subtab enables the Print Check Stub feature and defines how and what prints on the output. Select the Multi-Part Checks subtab from the Printing group, as shown in Figure 3-32:

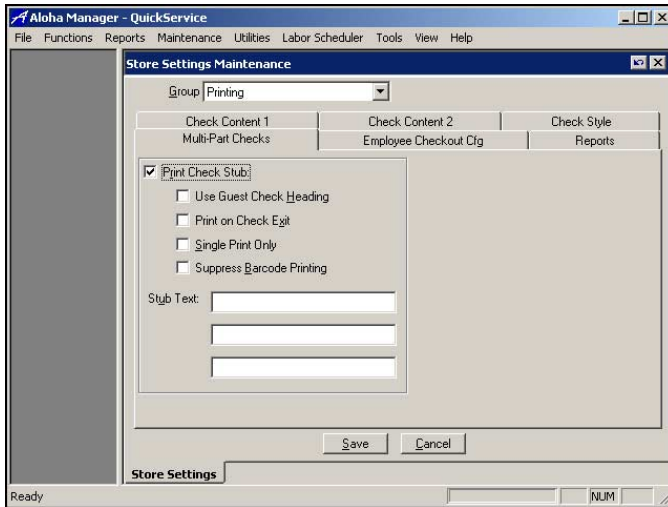


Figure 3-32 Multi-Part Subtab

Print Check Stub

The Print Check Stub feature supports environments where a guest orders as they walk into the restaurant. The person taking the order enters the items into the system, without ordering them, and a check stub prints for the guest to take with them to the table. The guest will then hand the check stub to the server. The server verifies the order, accesses the guest check in the system, and begins the process of ordering the items. The server maintains the guest check during the meal, and provides the guest with a check when they are ready to leave. The guest pays the server or the cashier, upon exiting.

Using the options in the 'Print Check Stub' group box, you can define the information to print on the check stub, as well as control whether to print a

check stub at initial order entry or to print a new check stub every time the server modifies the guest check.



To enable the Print Check Stub feature, you must select 'Disable Auto Ordering' in Maintenance > Store Settings > Order Entry > Tabs & Tables.

An example of a check stub displays as shown in the following example:

(Guest Check Message)	
(Address)	
(Telephone)	
(Stub Text Line 1)	
(Stub Text Line 2)	
(Stub Text Line 3)	
(Employee Name)	(Date)
(Check Number)	(Time)
(Order Items)	
(Bar Code)	

Print Check Stub — Enables the remaining options in the 'Print Check Stub' group box.

Use Guest Check Heading — Displays two areas of guest check information on the check stub. The top area displays lines as defined in Maintenance > Messages > Guest Checks. The next area displays the 'Address' and 'Telephone' text boxes defined on the Store Information subtab in Maintenance > Store Settings > System.

Print on Check Exit — Prints the check stub each time you exit the check. The check stub does not print until you exit the check, regardless of whether an item was ordered or not.

Single Print Only — Only prints the check stub the initial time you open and close the check. It does not print when you make modifications to the check.

Suppress Bar Code Printing — Does not print the bar code on the check stub. The bar code display is only supported on thermal printers.

Stub Text — Specifies the text to print on the check stub. Type up to 50 characters.

Employee Checkout Cfg Subtab

The Employee Checkout Cfg (Configuration) subtab enables you to determine the information to print on the employee checkout slip when an employee completes a shift and completes the checkout process.

If an employee has multiple checkouts per shift, the checkout displays the following lines:

Shift: 1
Checkout 1/2

Shift: 1
Checkout 2/2

Select the Employee Checkout Cfg subtab from the Printing group, as shown in Figure 3-33:

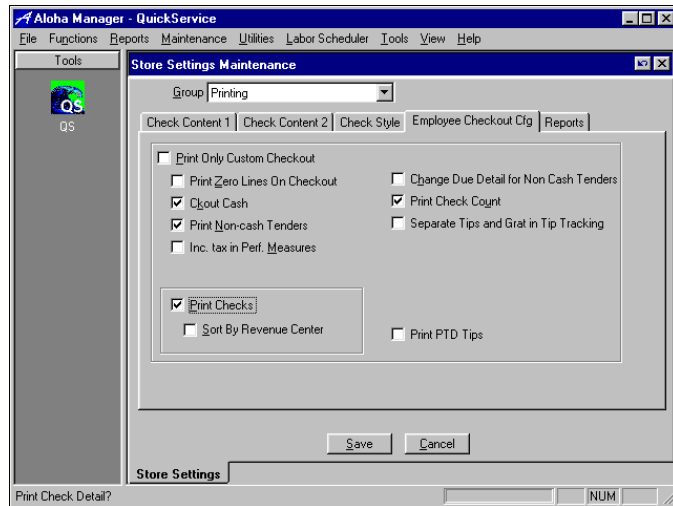


Figure 3-33 Printing Group, Employee Checkout Cfg Subtab

Print Only Custom Checkout — Prints only the custom checkout when an employee performs a checkout.

Print Zero Lines on Checkout — Prints all lines on the checkout report, even though some may be zero. When cleared, lines with zero values do not print.

Ckout Cash — Prints an alternate cash calculation on the checkout. The normal cash calculation adds all sales and subtracts all noncash payments to arrive at the cash amount. An extra section prints showing cash sales less charge tips to arrive at a cash owed figure.

Print Non-Cash Tenders — Prints a separate listing for noncash tenders.

Inc. Tax in Perf. Measures — Includes taxes in the totals printed for the Performance Measures report.

Change Due Detail for Non Cash Tenders — Prints, by tender, the total amount of change received from a noncash tender (gift certificates, travelers checks, etc.). If a guest check has multiple noncash tenders, the change due is allocated to the first noncash tender found on the check.

Separate Tips and Grat in Tip Tracking — Splits the non-cash tips from the auto gratuity in the Tip Tracking section of the checkout report. Use this setting in environments where tips are paid each night, but auto gratuities are paid on the employee's paycheck.

Print PTD Tips — Prints the day part and charged tips on the employee checkout. The sales for the current day and the percentage of sales are also printed.

Print Checks Inset

Print Checks — Prints a separate listing for tendered checks.

Sort by Revenue Center — Sorts guest checks by the revenue center in which they originated. Revenue center information is listed with the check detail information.

Reports Subtab

The Reports subtab enables you to define settings for the FOH Flash report and Sales by Revenue report. Select the Reports subtab from the Printing group, as shown in Figure 3-34:

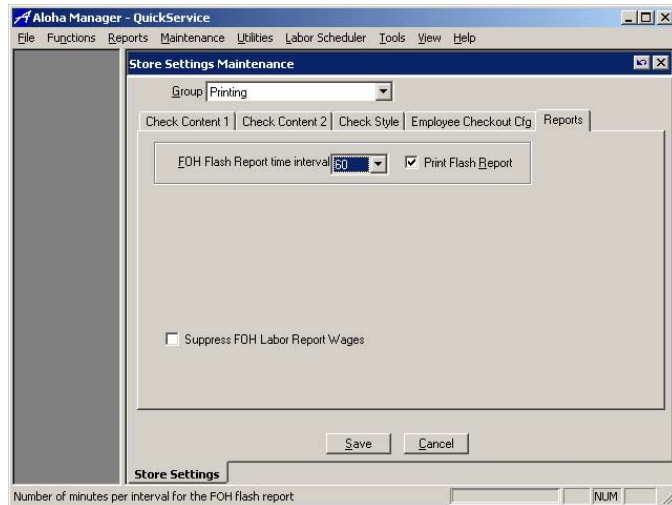


Figure 3-34 Printing Group, Reports Subtab

FOH Flash Report Time Interval — Represents the number of minutes per interval for the FOH flash report.

Print Flash Report — Enables the Print button to display on the FOH Entire Day Summary page of the Flash report.

Suppress FOH Labor Report Wages — Does not print wages on the FOH Labor report.

Printing - Chits

The Printing-Chits group enables you to set up various chit print styles and content, as well as other chits. To access the Printing-Chits group options, select Maintenance > Store Settings. Select Printing-Chits from the Group drop-down list. The corresponding subtabs display, with Chit Content as the default subtab.

Chit Content Subtab

The Chit Content subtab enables you to specify the items printed on each chit, the print mode, and how the items are sorted. Select the Chit Content subtab from the Printing-Chits group, as shown in Figure 3-35:

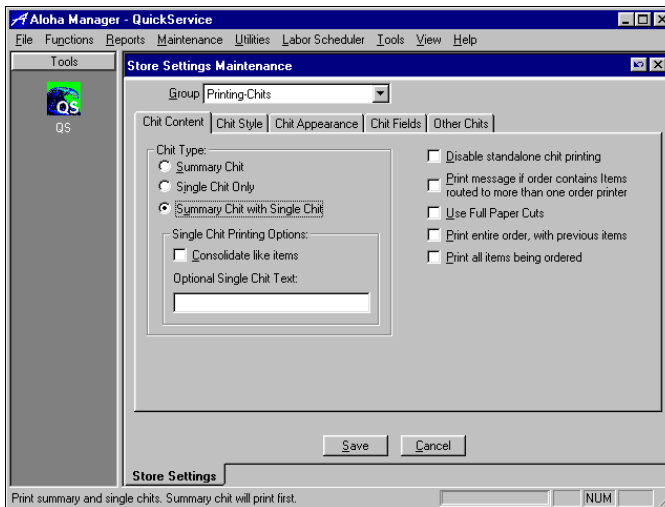


Figure 3-35 Printing Group, Chit Content Subtab

Chit Type

Select Summary Chit, Single Chit Only, or Summary Chit with Single Chit, to determine the information on chits and the way you print them.

Summary Chit — Prints the standard Aloha chit with a summary of all items for the order, followed by a full cut.

Single Chit Only — Prints a chit for each ordered item, followed by a half cut, as shown in Figure 3-36:

Printer Name Support up to 30 Character	Printer Name Support up to 30 Character	Printer Name Support up to 30 Character	Printer Name Support up to 30 Character	Printer Name Support up to 30 Character
waiter name date time table: 1 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 4.50 Cheeseburger TOTAL: \$50.31 Order Mode < Partial Cut > -----	waiter name date time table: 2 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 4.50 Cheeseburger TOTAL: \$50.31 Order Mode < Partial Cut > -----	waiter name date time table: 3 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut > -----	waiter name date time table: 4 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut > -----	waiter name date time table: 5 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut > -----

Figure 3-36 Single Chit Printing

Summary Chit with Single Chit — Prints the standard Aloha chit with a summary of all items for the order, followed by a full cut, and a chit for each ordered item, followed by a half cut, as shown in Figure 3-37:

Printer Name Support up to 30 Character	Printer Name Support up to 30 Character	Printer Name Support up to 30 Character	Printer Name Support up to 30 Character	Printer Name Support up to 30 Character	Printer Name Support up to 30 Character
waiter name date time table: 1 of 1 Order Mode: Guests: Check: 12345 Order Mode 2 9.00 Cheeseburger 3 21.00 Snapper TOTAL: \$50.48 Order Mode < Full Cut > -----	waiter name date time table: 1 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 4.50 Cheeseburger TOTAL: \$50.31 Order Mode < Partial Cut > -----	waiter name date time table: 2 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 4.50 Cheeseburger TOTAL: \$50.31 Order Mode < Partial Cut > -----	waiter name date time table: 3 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut > -----	waiter name date time table: 4 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut > -----	waiter name date time table: 5 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut > -----

Figure 3-37 Summary and Single Chit Printing

Single Chit Printing Options

When you select ‘Single Chit Only’ or ‘Summary Chit with Single Chit’, you can consolidate like items on a single chit and specify up to 30 characters to print at the top of each single chit.

Consolidate Like Items — Prints same items with same modifiers in consolidation on the chit. For example, with single chit printing, an order with two Hamburgers and three Snappers prints five separate chits for each item. With consolidation, only two chits print, one with (2) Hamburgers and one with (3) Snappers, as shown in Figure 3-38:

Printer Name ***** waiter name date time table: 1 of 1 Order Mode: Guests: Check: 12345 Order Mode 2 9.00 Cheeseburger 3 21.00 Snapper TOTAL: \$50.48 Order Mode < Full Cut >	Printer Name ***** Support up to 30 Character waiter name date time table: 1 of 2 Order Mode: Guests: Check: 12345 Order Mode 2 9.00 Cheeseburger TOTAL: \$50.31 Order Mode < Partial Cut > *****	Printer Name ***** Support up to 30 Character waiter name date time table: 2 of 2 Order Mode: Guests: Check: 12345 Order Mode 3 21.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut > *****
---	---	---

Figure 3-38 Consolidated Chit Printing

Optional Single Chit Text — Prints additional text, up to 30 characters, at the top of the chit.

Disable Standalone Chit Printing — Disables chit information from printing to a local printer. Standalone chit printing is when the local terminal is the master and no other terminals are in use, therefore, all chits are routed to the local printer.

Print Message if Order Contains Items Routed to More Than One Order Printer — Prints a message on the chit if an order is sent to multiple printers. The message is summarized at the top of the chit as follows:

More Items @
Food
Bar
Grill

Use Full Paper Cuts — Cuts printed receipts completely instead of partially.

Print all Items Being Ordered — Prints all items of an order that have not been committed to an order mode. This is for a normal printing environment.

Print Entire Order, with Previous Items — Prints all items of an order, regardless if previous items have been committed to an order mode. For example, if a dessert is added to a check that contained a previously ordered entree, both the dessert and the entree print on the chit.

Chit Style Subtab

The Chit Style subtab enables you to define how lines are printed, expediter printing, and sort options for the chit. Select the Chit Style subtab from the Printing-Chits group, as shown in Figure 3-39:

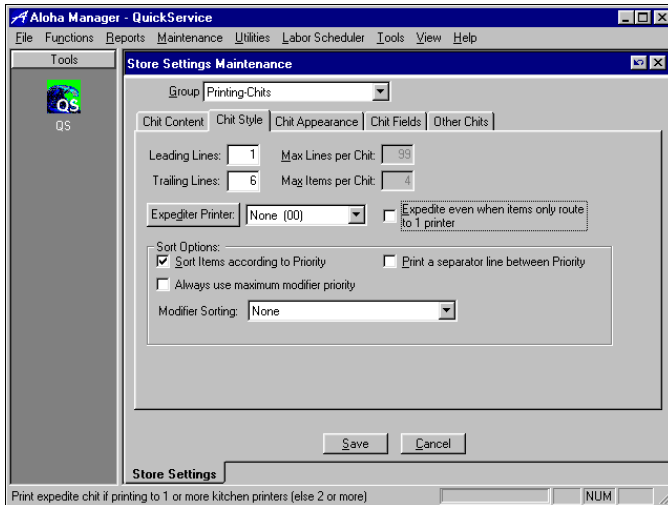


Figure 3-39 Printing Group, Chit Style Subtab

Leading Lines — Represents the number of blank lines to appear at the top of the chit. This positions the guest check on the page when it is printed.

Trailing Lines — Sets the number of blank lines to appear at the bottom of the chit.

Max Lines per Chit — Sets the maximum number of lines permitted on the chit.

Max Items per Chit — Sets the maximum number of items permitted on each chit.

Expediter Printer Button

Click Expediter Printer to access the Printers function tab. Here you can perform maintenance in the Printers function, including add new records if the printer you need is not already there.

Expediter Printer — Designates the printer in which a chit containing all menu items for orders will print. An order that has been split between two or more printer groups in the kitchen also prints in its entirety on the expediter printer. Orders not split between printer groups have no effect on the expediter. This only affects the printers defined with the 'In Kitchen' check box selected in Maintenance > Hardware > Printers > Options subtab.

Expedite Even When Items Only Route to 1 Printer — Prints an expediter chit when all ordered items are routed to one kitchen printer. If this check box is cleared, expediter chits print when an order is routed to two or more kitchen printers.

Sort Options Inset

Sort Items According to Priority — Causes menu items to print on the chit in the assigned priority. Items are sorted before printed and according to priorities assigned in Maintenance > Menu > Items.

Always Use Maximum Modifier Priority — If a modifier has a higher priority than the item it is modifying, the entire item takes on the priority of the highest modifier priority.

Print a Separator Line Between Priority — Prints a separator line between menu items with different priorities. This works in conjunction with 'Sort Items according to Priority'.

Modifier Sorting — Sorts the modifier on the chit according to the method selected in the drop-down list. Select one of the following sorting methods:

None	Displays modifiers in the order you enter them for the item.
Priority	(1) Sorts based on the priority defined for the modifier in Maintenance > Menu > Items. (2) If modifiers have the same priority, then sorts based on the order of the modifier groups attached to the menu item. (3) Sorts in alphabetical order.
Priority Only	(1) Sorts based on the priority defined for the modifier in Maintenance > Menu > Items, but identical modifier items are kept together. (2) Sorts by alphabetical order.
Modgroup	(1) Sorts based on the order of the modifier groups attached to the menu item. (2) Sorts based on the priority defined in Maintenance > Menu > Items. (3) Sorts in alphabetical order.

Chit Appearance Subtab

The Chit Appearance subtab enables you to define the appearance of the chit, such as font attributes, and how modifiers are printed. Select Chit Appearance from the Printing-Chits group, as shown in Figure 3-40:

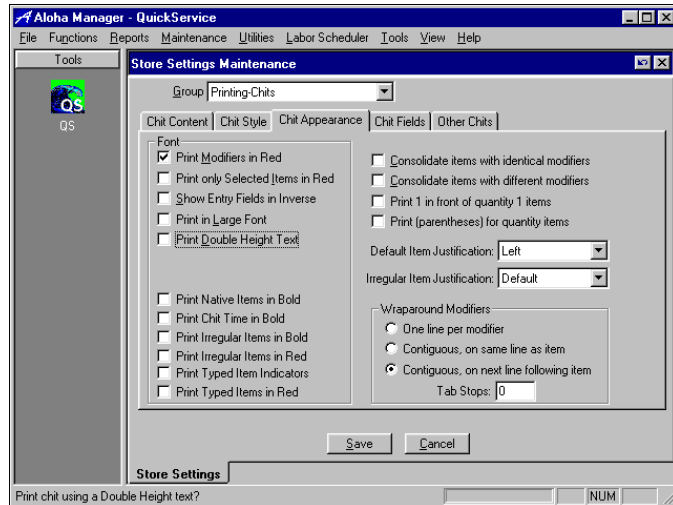


Figure 3-40 Printing Group, Chit Appearance Subtab

Consolidate Items with Identical Modifiers — Consolidates like items on the chit.

2 TBone
Rare
Salad
Beans

Consolidate Items with Different Modifiers — Consolidates items on the chit even if the modifiers are not the same.

2 TBone
1 Rare
Salad
Beans
1 Medium Rare
Salad
Beans

Print 1 in Front of Quantity 1 Items — Prints a '1' in front of any quantity 1 item on the chit, instead of '>'.

1 TBone
1 Rare
1 Salad
1 Beans

Print (parentheses) for Quantity Items — Prints the total number of like items in parenthesis.

(6) BBQ Sandwich

Default Item Justification — Enables items to print with left, right, or centered justification.

Irregular Item Justification — Enables No, Side, Extra, and Sub to print with left, right, or centered justification.

Font Inset

Print Modifiers in Red — Prints all modifiers in red ink when printed on color printers, or in reverse type on other printers.

Print Only Selected Items in Red — Prints menu items in red ink when printed on color printers when the 'Highlight' check box is selected, or in reverse type on other printers.

Show Entry Fields in Inverse — Displays text lines in white against a shaded background.

TBone

Print in Large Font — Prints the chit in a larger font.

Print Double Height Text — Doubles the height of the text.

Print Native Items in Bold — Prints items used as modifiers in bold. For example, a salad used as a modifier for a steak, prints in bold.

Print Chit Time in Bold — Prints the time the order was placed in bold.

Print Irregular Items in Bold — Prints No, Side, Extra, and Sub in bold.

Print Irregular Items in Red — Prints No, Side, Extra, and Sub in red.

Print Typed Item Indicators — Prints the preceding and succeeding exclamation point indicators when you enter the item using the QWERTY keyboard.

Print Typed Items in Red — Prints the entry in red when you enter the item using the QWERTY keyboard.

Wraparound Modifiers Inset

One Line Per Modifier — Prints one line per modifier under the item being modified. This setting is the default for normal operations.

Contiguous, on Same Line as Item — Prints modifiers as one single line along with the item being modified.

2 TBone Rare Salad Beans

Contiguous, on Next Line Following Item — Prints modifiers as one single line under the item being modified.

2 TBone
Rare Salad Beans

Tab Stops — Specifies the number of characters used to separate each modifier.

Chit Fields Subtab

The Chit Fields subtab enables you to define certain fields to print on the kitchen chit. You can also activate the Table Tent feature, which includes defining the range of table tent numbers and what displays or prints on the screen and chit. Select the Chit Fields subtab from the Printing-Chits group, as shown in Figure 3-41:

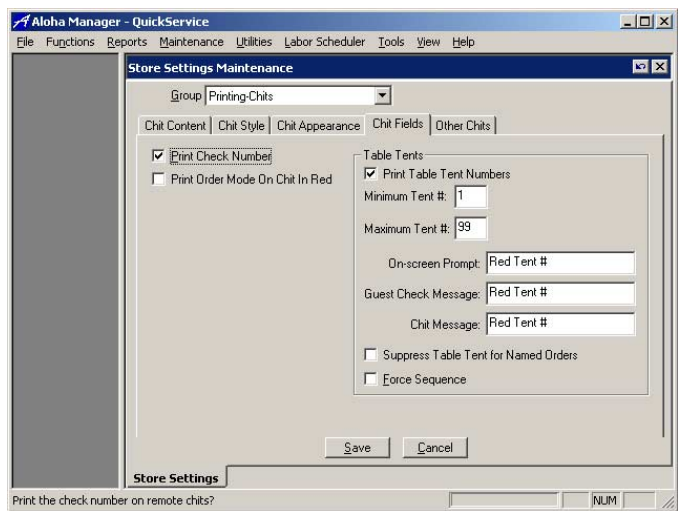


Figure 3-41 Printing - Chits Group, Chit Fields Subtab

Print Check Number — Prints the check number on the chit.

Print Order Mode on Chit in Red — Prints the selected order mode(s) in red on the chit.

Table Tents Inset

Table Tents are physical markers placed on the table, by either the guest or the employee, to help identify the delivery of orders. This is common in a counter environment that does not employ the use of table numbers and the orders require preparation time. This reduces the time a guest spends in line. When enabled, the Aloha system requires you to enter a table tent number when you send an order to the kitchen that contains an item routed to a printer group. For example, if you only order a non-alcoholic beverage, which is commonly not routed to a printer, the table tent prompt does not display.

Scenario: The guest orders a pizza from the front counter. The employee takes a physical table tent with a number, hands it to the guest, and enters the same number when sending the order. The guest places the table tent at his table. The food is delivered to the correct location by comparing the number on the chit or guest check with the number on the table tent.

You can only assign one table tent number per check. The number is generated from all terminals in use and appears on the chit, guest check, and in the Change Due message box. It does not appear on the video screen, if you are using a remote display systems add-on. In operations where you wish to name certain orders with the 'Name Order' function, instead of using the table tent prompt, select 'Suppress Table Tent for Named Orders'.

There are two FOH options for entering table tent numbers. The system automatically increments the table tent number by one for each order. You can override the system generated number and enter the number for each order, which starts a new numbering sequence. You can also use the 'Force Sequence' option to allow the system to keep the same numbering sequence and offer you the next table number, which you can accept or skip. Both options accommodate situations when a table tent is lost or not placed in order.

Print Table Tent Numbers — Activates the Table Tent feature and enables the remaining settings in the inset.

Minimum Tent # — Designates the beginning number in the series. Type a number up to 9998 and lower than the 'Maximum Tent #'. Leave this text box blank if you want to always manually enter the table tent number in the FOH.

Maximum Tent # — Designates the ending number in the series. Type a number up to 9999 and higher than the ‘Minimum Tent #’. Leave this text box blank if you want to always manually enter the table tent number in the FOH.

On-screen Prompt — Designates the text for the prompt on the FOH Change Due message box, such as ‘Tent #’.

Guest Check Message — Designates the message line to display on the guest check, such as ‘Order #’.

Chit Message — Designates the message line to display on the chit, such as ‘Order #’.

Suppress Table Tent for Named Orders — Does not display a prompt for a table tent number when you perform a ‘Name Order’ function before you send the item to the kitchen.

Scenario 1: Enter an item that will be sent to the kitchen, name the order with the ‘Name Order’ function, then send the order to the kitchen. The table tent prompt does not display.

Scenario 2: Enter an item that will be sent to the kitchen, send the item with an available order mode, then name the order with the ‘Name Order’ function. The table tent prompt displays.

Force Sequence — Retains the original numbering sequence as defined in the minimum and maximum tent numbers. You can not manually enter a table tent number, but you can skip the offered table tent number and accept the next available number in sequence.



Refer to Chapter 5, Menu Maintenance Functions, for more information on the Name Order function.

Other Chits Subtab

The Other Chits subtab enables you to specify various chit settings for other types of chits you may print, such as tray chit printing, order taker chits, and void chits. Select the Other Chits subtab from the Printing-Chits group, as shown in Figure 3-42:

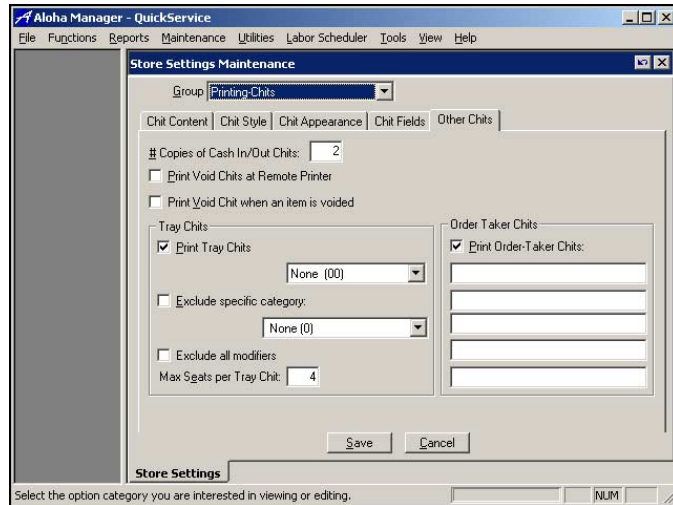


Figure 3-42 Printing Group, Other Chits Subtab

Copies of Cash In/Out — Denotes the number of chit copies to print for each petty cash in/out transaction. Set this to a number greater than zero.

Print Void Chits at Remote Printer — Prints only voided chits to a remote printer.

Print Void Chit when an Item is Voided — Prints a void chit when an item is voided.

Tray Chits Inset

Print Tray Chits — Enables tray chit printing on the printer designated in the drop-down list. This option facilitates the Sub-orders feature. Items print to their designated printer routings and the expediter receives a full chit with all items listed for their respective sub-orders.

Tray Chit drop-down — Specifies the printer to use as a tray chit printer.

Exclude Specific Category — Indicates you want to exclude a specific category from printing on the chit. This feature is used with the Sub-orders feature so that a category of items, such as Beverages, does not print on kitchen chits.

Exclude All Modifiers — Does not print the modifiers on the tray chit.

Max Seats per Tray Chit — Sets the maximum number of seats per tray for each chit.

Order Taker Chits Inset

Print Order-Taker Chits — Prints order taker chits. This works in conjunction with the 'Order Taker' check box located in Maintenance > Labor > Job Codes > TableService subtab.

Check text — Specifies the text to print on order-taker chits. This text box is used only if 'Print Order-Taker Chits' is selected.

User Interface

The User Interface group enables you to define settings for the FOH touch screen, such as screen timeouts, screen beeps, and order entry screen settings. To access store settings for User Interface, select Maintenance > Store Settings. Select User Interface from the Group drop-down list. The corresponding subtabs display, with POS as the default subtab, as shown in Figure 3-43:

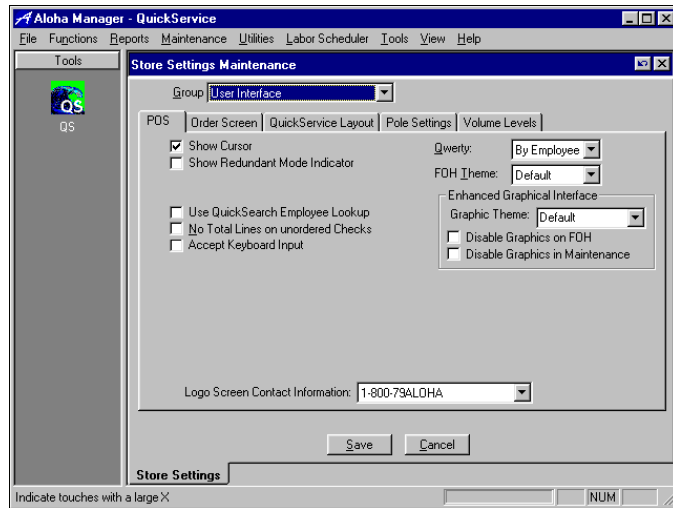


Figure 3-43 User Interface Group, POS Subtab

The User Interface group provides the following subtabs: POS, Order Screen, QuickService Layout, Pole Settings, and User Volume Levels.

POS Subtab

The POS subtab enables you to define the screen display and screen timeout settings.

Show Cursor — Changes the cursor to a large 'X' on the FOH touch screen. Normally, the cursor is a single dot.

Show Redundant Mode Indicator — Displays a red outline on the logon screen if the system is in Redundant mode.

Use QuickSearch Employee Lookup — Enables a FOH lookup screen for every instance that an employee must be selected. With this feature, employees can be searched alphabetically or by numeric ID.

No Total Lines on Unordered Checks — Does not print the check total line on unordered guest checks.

Qwerty — Determines if and when the Qwerty screen keypad option is enabled. The keypad configuration is designated in the employee record, but this field can be used to either override or accept that designation. This can be set to 'Never' use the Qwerty keypad, 'Always' use the Qwerty keypad, or 'By Employee', to designate the use of the Qwerty keypad by employee preference.



The Qwerty setting in the employee's record overrides the setting in Store Settings.

FOH Theme — Denotes the pre-defined design theme for the Front-of-House interface, instead of the basic Aloha theme shown in this manual. For the QuickService product, the FOH theme affects the standard screens, such as the Clock-In screen, Log-In screen, and others. The themes and corresponding bitmaps must be installed from the installation disk. The four available themes are:

- Blue Stone
- Fabric
- Marble
- Wave

Logo Screen Contact Information — Displays the text for contact information on the Floating Logo screen.

Enhanced Graphics Interface (EGI)

The Enhanced Graphics Interface (EGI) feature enables you to use gradient, shadowing, and texture enhancements on buttons on the FOH. The computer running the interface must be set for High Color (16 bits or greater), and have 64 MB of RAM or greater. For new installations, Aloha Technologies automatically enables the Enhanced Graphic Interface on any system meeting these requirements. If the system does not meet these requirements, the regular default screen appearance displays. For upgrades, you must enable this feature, and select a scheme. You can select from the schemes provided by Aloha Technologies, or define your own EGI scheme. You can not use this feature with any of the cool interface FOH themes.

Graphic Theme — Specifies the enhanced graphic interface scheme to use on the FOH and BOH. Leave this set to 'Default' to display the basic interface, or select a scheme designed by Aloha Technologies, such as 'Lemon-Lime' or 'Pineapple'. You can also custom design your own schemes. This is done using EGI2.CFG. All schemes you define in EGI2.CFG display at the bottom of this list.

Disable Graphic on FOH — Disables the enhanced graphic interface on the FOH screens.

Disable Graphics in Maintenance — Disables the enhanced graphic interface on the BOH screens representing the FOH, such as menus, submenus, modifiers, exception modifiers, Panel Editor, and the floor plan.

EGI.CFG and EGI2.CFG

EGI.CGF and EGI2.CFG are configuration files that define the colors and bit-maps used by the schemes. Although the BOH and FOH read the configuration files in ALOHA\DATA, you should store a copy of both of them in ALOHA\NEWDATA and in ALOHA\DATA, and only edit the version in ALOHA\NEWDATA.

EGI.CFG is the default configuration file supplied with the Aloha POS system and contains the schemes designed by Aloha Technologies. EGI2.CFG is intended for user-defined schemes, and it is not overwritten during an upgrade. We recommend only editing EGI2.CFG.

Each configuration file is a text-based file that contains variables and values that set the configuration. Each scheme within the configuration file has a scheme name label [Scheme *n*], where *n* is the scheme number. For example, EGI.CFG contains a Scheme1 label, and others. When you create new schemes for EGI2.CFG, number your schemes starting with 100 to avoid conflicts with the scheme numbers used by Aloha Technologies in EGI.CFG.

EGI.CFG and EGI2.CFG use the following variables:

Name	Default	Description
NAME	None	The name of the scheme. Recommended 20 characters or less.
BUTTONCOLOR	176,176,208	Red-Green-Blue (RGB) value of the default button color.
BACKGROUND	None	The name of a bitmap to use as the background texture for dialog boxes.
BACKGROUND-COLOR	255,255,255	RGB value of the default dialog box background color.
MSGBOXCOLOR	192,192,193	RGB value of the default message box color.
BORDERPIXELS	8,7, or 3	The number of pixels around the button border. The defaults are based on resolution: 1024x768=8, 800x600=7, 640x480=3
CHECKBACK-GROUND	None	The name of a bitmap to use as the background texture for the check display. This function is currently not used.
CHECKCOLOR	255,255,255	RGB value of the default color for an inactive check.
SELECTED-CHECKCOLOR	51,204,255	RGB value of the default color of a selected check.
TRAININGCHECK-COLOR	102,255,153	RGB value of the default color of training checks.
LABEL	0,0,0	RGB value of the default color for text labels on the window background.
RED	255,0,0	RGB value of the color to substitute for red text on buttons.
GREEN	0,255,0	RGB value of the color to substitute for green text on buttons.

Name	Default	Description
BLUE	0,0,255	RGB value of the color to substitute for blue text on buttons.
WHITE	255,255,255	RGB value of the color to substitute for white text on buttons.
BLACK	0,0,0	RGB value of the color to substitute for black text on buttons.
PURPLE	255,0,255	RGB value of the color to substitute for purple text on buttons.
MAROON	128,0,0	RGB value of the color to substitute for maroon text on buttons.
MSGBMPPREFIX	Msg	The prefix for the default message box animation bitmaps. Name the files as the following: x1.bmp, x2bmp, x3bmp, and so on, where x is the prefix. For example, Msg1.bmp, Msg2.bmp, and so on.
PRTBMPPREFIX	MsgPrt	The prefix for the printer error message box animation bitmaps. Name the files as the following: x1.bmp, x2bmp, x3bmp, and so on, where x is the prefix. For example, MsgPrt1.bmp, MsgPrt2.bmp, and so on.
ARROWBMPPRE-FIX	Arrow	The prefix for the six scroll button bitmaps. Name the files as the following: xUp.bmp, xPageUp.bmp, xDown.bmp, xPageDown.bmp, xLeft.bmp, and xRight.bmp, where x is the prefix. For example, ArrowUp.bmp, ArrowPageDown.bmp, and so on.

You must store all bitmaps in the \BMP folder. If you are not using a setting, do not leave it blank. Comment it out by using a semicolon at the beginning of the variable. Otherwise it will force the value to zero or blank, instead of the default. Use the RGB value 192,192,193 to specify gray, because the usual value of 192,192,192 has a special meaning to the Aloha system.

Order Screen Subtab

This subtab enables you to define the number of rows and columns in your order entry screen, and to define categories available for use. Select the Order Screen subtab from the User Interface group, as shown in Figure 3-44:

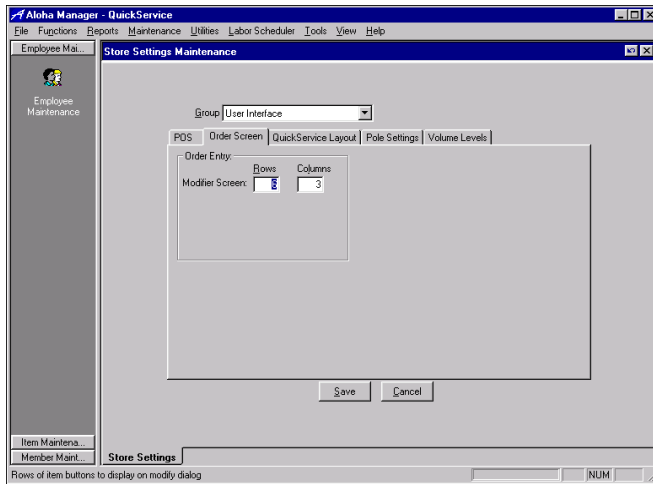


Figure 3-44 User Interface Group, Order Screen Subtab

Order Entry Inset

Modifier Screen Rows — Specifies the number of rows of item buttons to display on the Modifiers function tab in Maintenance > Menu > Modifiers and on the FOH.

Modifier Screen Columns — Specifies the number of columns of item buttons to display on the Modifiers function tab in Maintenance > Menu > Modifiers and on the FOH.

QuickService Layout Subtab

This subtab enables you to determine the position and size of the Change Due message on the FOH, as well as the properties of the on-screen guest check. Select the QuickService Layout subtab from the User Interface group, as shown in Figure 3-45:

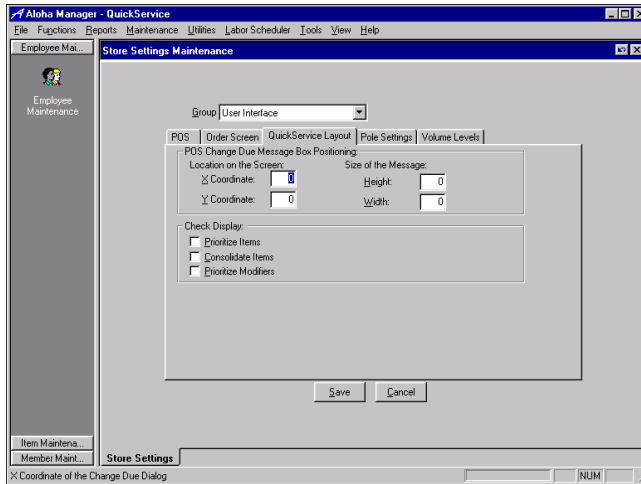


Figure 3-45 User Interface Group, QuickService Layout Subtab

POS Change Due Message Box Positioning Inset

X Coordinate — Designates the X coordinate number of the Change Due message box on the FOH.

Y Coordinate — Designates the Y coordinate number of the Change Due message on the FOH.

Height — Designates the text height of the Change Due message box on the FOH.

Width — Designates the text width of the Change Due message box on the FOH.

Check Display Inset

Prioritize Items — Prioritizes items on the guest check by order of entry.

Consolidate Items — Combines like items on the guest check, rather than list them separately.

Prioritize Modifiers — Prioritizes modifier items by order of entry.

Pole Settings Subtab

The Pole Settings subtab provides options to display a user-defined message on the pole display when the terminal is not in use, display the guest check subtotal during ordering, and enable any remaining gift card balance to appear. Select the Pole Settings subtab from the User Interface group, as shown in Figure 3-46:

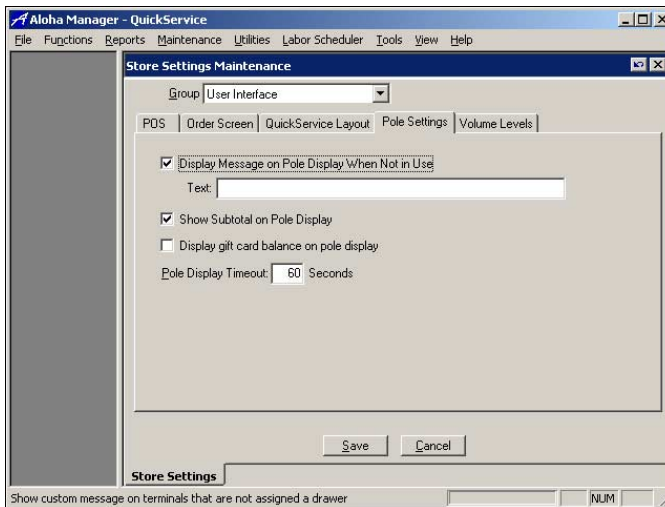


Figure 3-46 Pole Settings Subtab

Display Message on Pole Display When Not in Use — Enables text to display on the pole display when not in use. If employees self-assign their drawers, the message displays after the FOH “You are now assigned to the bank” message.



Refer to the Aloha QuickService Special Features Guide for more information on gift cards.

Text — Designates the text to display on the pole display, such as “Closed” or “Next Register”.

Show Subtotal on Pole Display — Displays the running subtotal on the pole display.

Display Gift Card Balance on Pole Display — Displays the remaining balance of a gift card when closing the check to a gift card tender. This setting is enabled when you select ‘Use Gift Card Sales’ in the Gift Card/Certificates group and you are authorized for gift cards.

Pole Display Timeout — Specifies the number of seconds for the pole display message to display before disappearing.

Volume Levels Subtab

The Volume Levels subtab enables you to set indicators for the volume of business at a particular time. This indicator is shown on the FOH and video status bars. To set volume levels, a series of levels must be defined in Maintenance > System > Volume Levels, that contain a range of dollar values for gross sales (high and low), and define an interval to be used as a comparison time frame. The FOH denotes the level of operation on the status bar based on

the amount of gross sales over the defined interval. Select the Volume Levels subtab from the User Interface group, as shown in Figure 3-47:

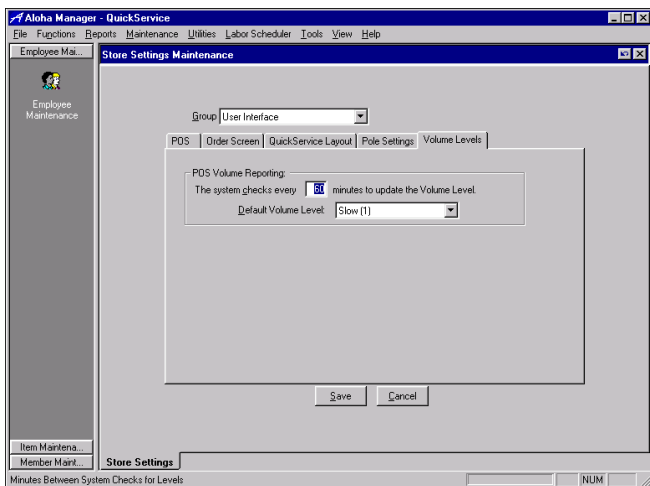


Figure 3-47 User Volume Levels Subtab

POS Volume Reporting Inset

The system checks every _ minutes to update the Volume Level — Designates the number of minutes for the system to wait before checking the volume level of the restaurant. Volume Levels work with remote display systems and defined in Maintenance > System > Volume Levels. For example, an interval is 15 minutes and volume level 1 with a high/low of \$0 to \$100, and volume level 2 with a high/low of \$100.01 to \$200, with the default set to Automatic. The volume level displays at level 2 for a sale of \$120 would make the volume level display at level 2.

Default Volume Level — Select the volume level for the default, as defined in Maintenance > System > Volume Levels.

Security

The Security group enables you to define security settings for the POS system, POS passwords, restrictions, and the cash drawer. To access the Security group settings, select Maintenance > Store Settings. The Store Settings function tab displays. Select Security from the Group drop-down list. The corresponding subtabs display, with POS Security as the default subtab, as shown in Figure 3-48:

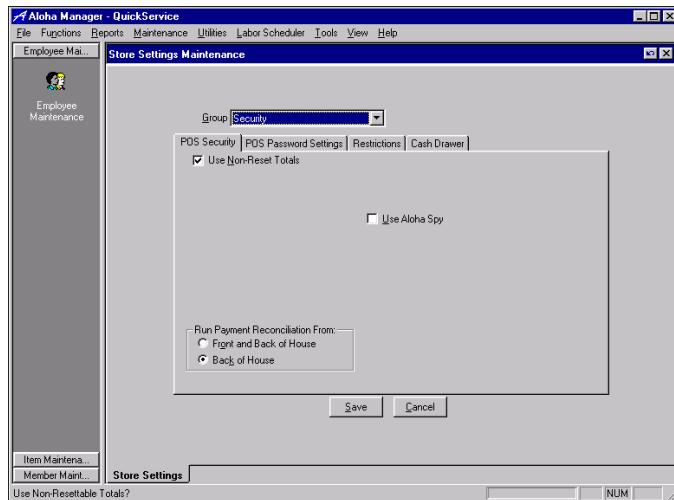


Figure 3-48 Security Group, POS Security Subtab

The Security group provides the following subtabs: POS Security, POS Password Settings, Restrictions, and Cash Drawer.

POS Security Subtab

This subtab enables you to activate the use of Aloha Spy and lets you establish the location from which Payment Reconciliation will be processed. Select the POS Security subtab from the Security group.

Use Non-Reset Totals — Carries totals forward without resetting them to zero. These figures appear on the BOH sales report.

Use Aloha Spy — Activates the Aloha Spy program. Aloha Spy interfaces with the TVS security video in the BOH, to pass data from the FOH to display on the TVS camera in the BOH.

Run Payment Reconciliation From Inset

Front and Back of House — Provides the ability to run the Payment Reconciliation process from the FOH POS terminal and from the menu in Aloha Manager on the BOH terminal. This is beneficial when several servers need to run the Payment Reconciliation process and the FOH terminal is being used.

Back of House — Sets the Payment Reconciliation process to operate from the Functions menu on the BOH terminal only.



Refer to
Payment
Reconciliation in the
Aloha QuickService Spe-
cial Features Guide for
more information.

POS Password Settings Subtab

This subtab enables you to define employee password and number digits, as well as to enable, disable, or require a password for each employee. Select the POS Password Settings subtab from the Security group, as shown in Figure 3-49:

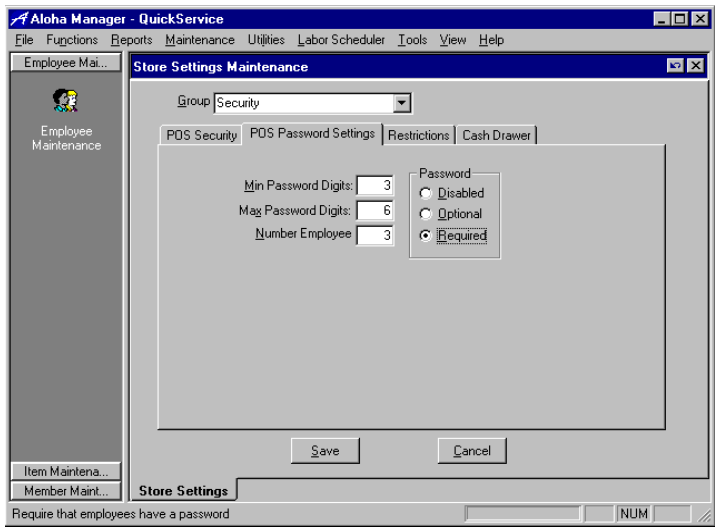


Figure 3-49 Security Group, POS Password Settings Subtab

Min Password Digits — Specifies the minimum number of alphanumeric characters permitted for passwords.

Max Password Digits — Specifies the maximum number of alphanumeric characters permitted for passwords.

Number Employee — Defines the number of characters to use when logging in to the system. Enter a number from 3 to 9 digits. Enter leading zeros when logging in to the system. For example, if the employee number is '105' and the 'Number Employee' text box is set to '4', enter '0105' on the FOH terminal when logging in.

Password Inset

Disabled — Disables the FOH password function that enables employees to log in using only their employee login number. If 'Disabled' is selected, the Change Password button does not display on the FOH Employee Functions screen. The button does not display, even if the 'Uses Password' check box is selected in the Job Codes subtab. (The Job Codes subtab is located in Maintenance > Labor > Job Codes.)

Optional — Allows employees to choose whether they use a password to log in to the FOH.

Required — Requires employees to use numeric passwords to access the FOH.



If you are using numeric passwords and not magnetic cards, 'Required' must be selected.

Restrictions Subtab

This subtab enables you to specify minimum and maximum open item prices, the time allowed to void entries, and other restrictions. Select the Restrictions subtab from the Security group, as shown in Figure 3-50:

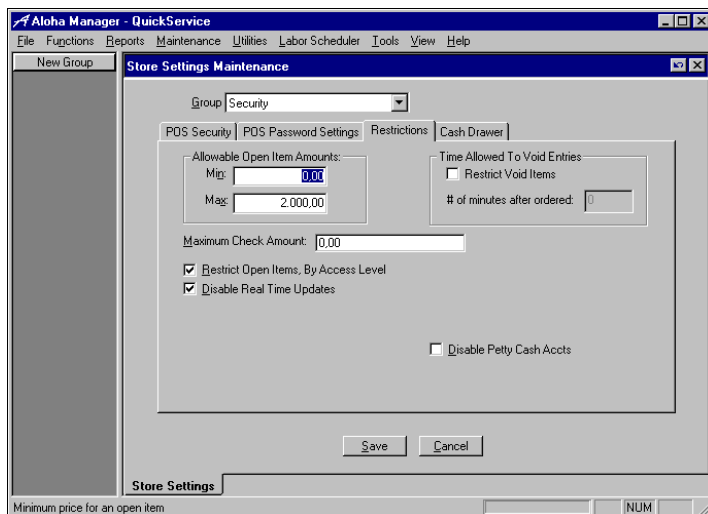


Figure 3-50 Security Group, Restrictions Subtab

Maximum Check Amount — Sets the maximum value of a guest check. Enter a dollar amount of \$0.01 to \$999999.99. Enter 0 if you do not want to set a restriction. As you are adding items to the check, the system monitors the total, and when the complete total, including taxes and surcharges, exceeds the specified amount, an error message displays. You can no longer add items to the check. You must close the check, and start a new one.

Restrict Open Items, by Access Level — Uses access levels to determine who can use the open item feature.

Disable Real Time Updates — Requires a full refresh be performed to update employee and PLU item changes or additions in the FOH.

Disable Petty Cash Accounts — Disables the use of petty cash accounts.

Allowable Open Item Amounts Inset

Min — Sets the lowest price that can be entered for an open item.

Max — Sets the highest price that can be entered for an open item.

Time Allowed To Void Entries Inset

Restrict Void Items — Limits the amount of time to void entries after they are committed to an order mode.

of Minutes After Ordered — Specifies the number of minutes allowed between the time an item is committed to an order mode, and the time it can be voided.

Cash Drawer Subtab

This subtab enables you to specify cash drawer security settings. Select the Cash Drawer subtab from the Security group, as shown in Figure 3-51:

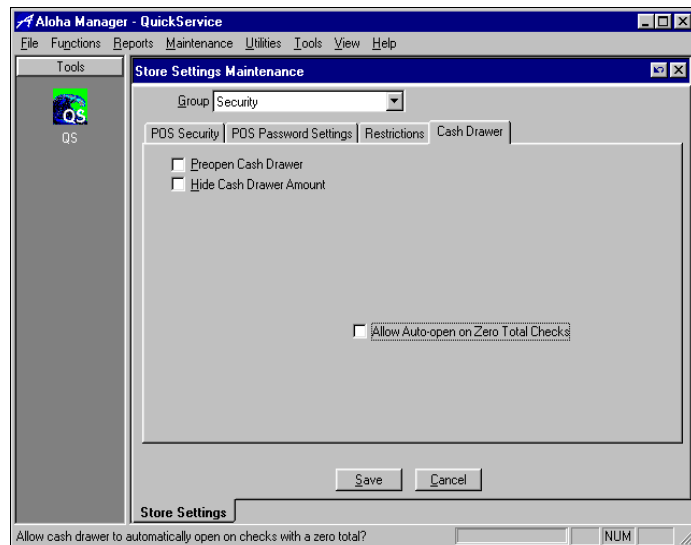


Figure 3-51 Security Group, Cash Drawer Subtab

Preopen Cash Drawer — Pre-opens the cash drawer on each cash in/out transaction.

Hide Cash Drawer Amount — Prevents the cash drawer amount from displaying in drawer functions. If you select this check box, the calculated amount in the cash drawer does not display on the Drawer screen in the Cash Drawers function. If you clear this check box, the calculated dollar amount in the cash drawer displays on the Drawers screen.

Allow Auto-Open on Zero Total Checks — Automatically opens the cash drawer when the check is reduced to a zero balance. A zero balance occurs when you add items to a check, then the check is reduced to zero, using a void, comp and/or a promotion. A zero balance also occurs when an employee try to close a check with a zero priced item, such as water. This setting overrides the ‘Open Drawer on Close’ check box in Maintenance > Payments > Tenders > Tenders subtab.

System

The System group enables you to set up your system date and time, security key information, store address and phone number, interfaces for the FOH, maximum number of items, disk maintenance functions, and EOD settings. Select Maintenance > Store Settings. Select System from the Group drop-down list. The corresponding subtabs display, with Date/Time as the default subtab, as shown in Figure 3-52:

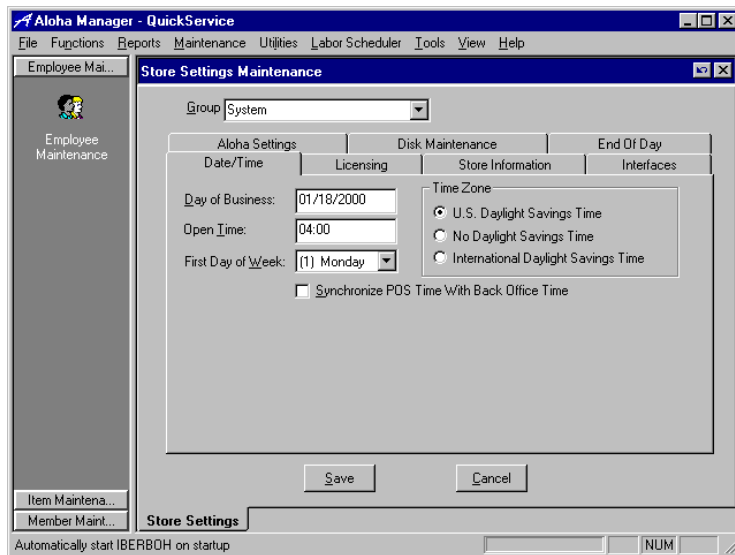


Figure 3-52 System Group, Date/Time Subtab

The System group provides the following subtabs: Date/Time, Licensing, Store Information, Interfaces, Aloha Settings, Disk Maintenance, and End Of Day.

Date/Time Subtab

The Date/Time subtab enables you to define the business date, open time, first day of week, and time zone settings.

Day of Business — Displays the business date as recognized by the system, regardless of the actual calendar date. The EOD procedure automatically updates this field when the system is in operation, and the value should correspond to the calendar date.

Open Time — Displays the daily restaurant opening time.

First Day of Week — Displays the first day of the payroll period. Select the appropriate day from the drop-down list.

Time Zone Inset

Some countries do not follow the United States rules for DST or do not observe DST at all. For example, in the Southern Hemisphere DST is observed by springing forward one hour in September or October, instead of during April, which is the month that DST is observed in the United States. Daylight Savings Time for the U.S. and its territories is NOT observed in Hawaii, American Samoa, Guam, Puerto Rico, the Virgin Islands, the Eastern Time Zone portion of the State of Indiana, and most of Arizona (with the exception of the Navajo Indian Reservation in Arizona). The TIMEZONE variable is used for these situations.

U.S. Daylight Savings Time — Sets the system to use United States DST settings. This is the default value, which uses the United States rules for DST to spring forward in April, and fall back in October.

No Daylight Savings Time — Specifies your area does not observe daylight savings time. This prevents the Aloha programs from springing forward or falling back. **Note:** All terminals and the file server must be set to a state or area that does not observe DST for this variable to work properly.

International Daylight Savings Time — Specifies you are outside the United States and do observe daylight savings time. The DST rules of the local country are followed.

When assigning INTL (international) to the TIMEZONE variable, TIMEZONE.INI, which stores the time zone settings on the file server, is created. The latest versions of data in the \DATA directory, and the new TIMEZONE.INI with the new settings, is copied from the file server to the FOH when the FOH terminals synchronize upon boot up.

Synchronize POS Time with Back Office Time — Makes the time setting on your POS terminal correspond to the time setting on your back office terminal. This causes the SYNCTIME.EXE file to run every two hours for all terminals on the system, which synchronizes the terminal time with the time on the file server. It does not interfere with normal operations.

To set Daylight Savings Time to NO DST or INTL, the following procedures must be done. It is not adequate to select the No Daylight Savings Time check box or the International Daylight Savings Time check box, without also performing the following procedures:

On each FOH terminal and on the BOH file server:

1. Select **Start > Settings > Control Panel**.
2. Double-click the **Date/Time** icon.
3. Select the **Time Zone** tab.
4. Select the appropriate **state** or **area** from the drop-down list.
5. Select the **Automatically adjust the clock for daylight changes** check box. Note: This check box must be selected on the BOH file server, and all FOH terminals.
6. Click **OK**.

On the BOH file server:

1. Delete the **TIMEZONE.INI** file located in ALOHA\DATA.



TIMEZONE.INI only exists in the \DATA directory if the timezone was set to INTL at one time. This file should not be in the \NEW-DATA directory. If it is, delete it from this directory also.

2. Log in to the **BOH**.
 3. Select **Maintenance > Store Settings** to display the Store Settings function tab.
 4. Select **System** from the **Group** drop-down list.
 5. Select the **Date/Time** subtab.
-

6. Select either **No Daylight Savings Time** or **International Daylight Savings Time**.
7. Click **Save** and exit the Store Settings function.
8. Select **Utilities > Refresh Data**.
9. Exit the **BOH**.
10. Launch the **BOH** again with the new time zone settings. The TIMEZONE.INI file is built (if the time zone is set to International Daylight Savings Time).
11. Select **Utilities > Refresh Data** to update the TIMEZONE.INI file on all FOH terminals.

Licensing Subtab

This subtab enables you to enter the security key numbers provided as part of the Aloha system installation. (Some Aloha products require six security codes.) The key information is specific to each restaurant, and must be entered correctly before the system is enabled. Incorrect security key information disables the Aloha POS system. Select the Licensing subtab from the System group, as shown in Figure 3-53:

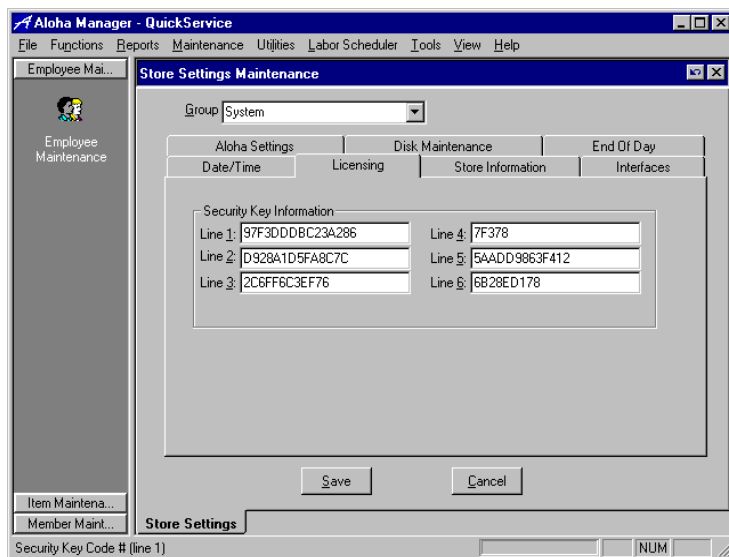


Figure 3-53 System Group, Licensing Subtab

Security Key Information Inset

When entering the security key information, enter the codes exactly as printed on the key. Enter only zeros, there are no letter O's in the code.

Line 1 — Represents the numbers labeled SEC1 on your security key information sheet.

Line 2 — Represents the numbers labeled SEC2 on your security key information sheet.

Line 3 — Represents the numbers labeled SEC3 on your security key information sheet.

Line 4 — Represents the numbers labeled SEC4 on your security key information sheet.

Line 5 — Represents the numbers labeled SEC5 on your security key information sheet.

Line 6 — Represents the numbers labeled SEC6 on your security key information sheet.

Store Information Subtab

This subtab enables you to enter your location's name, address, and phone number(s). Select the Store Information subtab from the System group, as shown in Figure 3-54:

Figure 3-54 System Group, Store Information Subtab

Unit No. — Enter a unit number, up to six digits. This is optional and is useful for chain operators with unique store numbers for each location.

Unit — Enter the store name.

Business Num — Enter the business contact number.

Address — Enter the physical street address, city, state, and zip code on the two address lines.

Mailing Address — Denotes the street address, city, state, and zip code in which to receive mail.

Telephone 1 — Denotes the phone number at your store.

Telephone 2 — Denotes an alternate phone number for your store.

City/Town — Denotes the name of the city or town for your store.

State — Denotes the name of the state for your store.

Postal Code — Denotes the postal code for your store.

Interfaces Subtab

This subtab enables you to specify automatic BOH settings, FOH interface, etc. Select the Interfaces subtab from the System group, as shown in Figure 3-55:

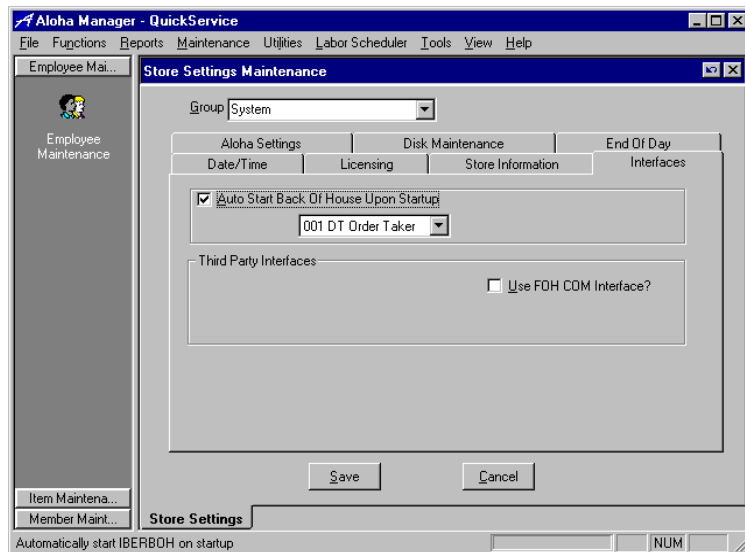


Figure 3-55 System Group, Interfaces Subtab

Auto Start Back of House Upon Startup — Works in conjunction with the selected terminal to automatically start the BOH on the selected terminal at system startup. This check box is normally selected when the Aloha network file server is the same as the master terminal.

Third Party Interfaces Inset

Third party interfaces permit the selection of a third party table management and/or frequent diner system software interface.

Use FOH COM Interface? — Activates the Aloha FOH interfaces.

Aloha Settings Subtab

This subtab enables you to establish the maximum number of items that can be stored in the system, log actions, and to disable the auto-grind process. Select the Aloha Settings subtab from the System group, as shown in Figure 3-56:

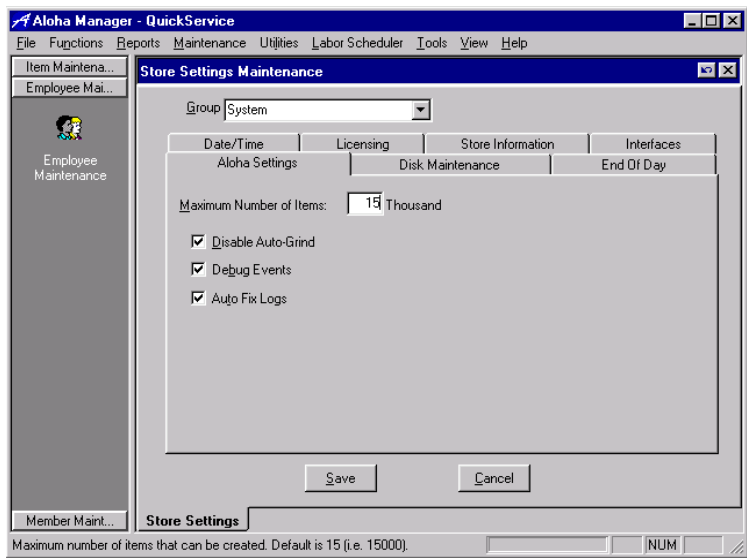


Figure 3-56 System Group, Aloha Settings Subtab

Maximum Number of Items — Specifies the maximum number of items (in thousands) that can be created and stored in the system. The default is 15,000. The maximum number of items that can be defined is 100,000.

Disable Auto-Grind — Disables the automatic data processing and summarizing of previous day's activities. This check box should only be selected during initial setup or when troubleshooting the Aloha installation.

Debug Events — Writes events to the debug log. This is found in the C:\ALOHAQS\TMP\DEBOUT directory.

Auto Fix Logs — Enables terminals to automatically fix corrupt transaction, printer, and video logs. If errors appear in these logs, a notification message appears in red on the FOH.

Disk Maintenance Subtab

This subtab enables you to control warning messages and purged information. Select the Disk Maintenance subtab from the System group, as shown in Figure 3-57:

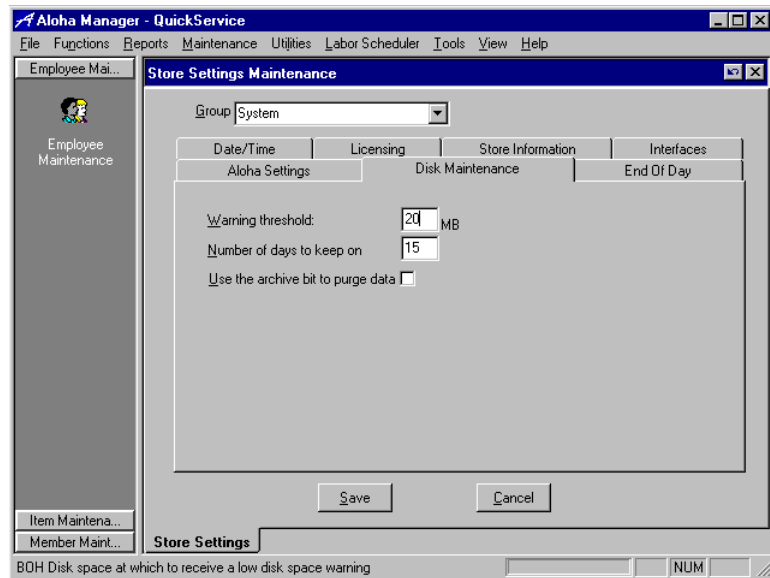


Figure 3-57 System Group, Disk Maintenance Subtab

Warning Threshold — Specifies (in megabytes) the amount of hard drive disk space left when the low disk space warning is given.

Number of Days to Keep On — Specifies the number of days to store dated subdirectories on the hard drive. During the end-of-day process, the system compares the current system date against dated subdirectories and removes the dated subdirectories that are older than the number of days specified in this text box. Do not enter a value in this text box if you do want to use the purge function, or if you do not perform regular backups.

Use the Archive Bit to Purge Data — Purges only the files that have the ‘Archive’ attribute cleared (turned off). There are many ways in which to clear the ‘Archive’ attribute, but normally this is done by a third-party backup program. You would not normally select the ‘Use the Archive Bit to Purge Data’ check box unless you are using a third-party program to perform regular backups.

When you create or change a file, Microsoft® Windows® sets the ‘Archive’ file attribute (turns it on). If you specify a number in ‘Number of Days to Keep On’, and do not select ‘Use the Archive Bit to Purge Data’, during the end-of-day process, the system purges all dated subdirectories older than the number of days you specify. If you specify a number and you also select ‘Use the Archive Bit to Purge Data’, the end-of-day process will not purge any file in which the ‘Archive’ attribute is not cleared (turned off), regardless if it is older than the number of days you specify.

End Of Day Subtab

This subtab enables you to create various End-of-Day (EOD) settings. Select the End Of Day subtab from the System group, as shown in Figure 3-58:

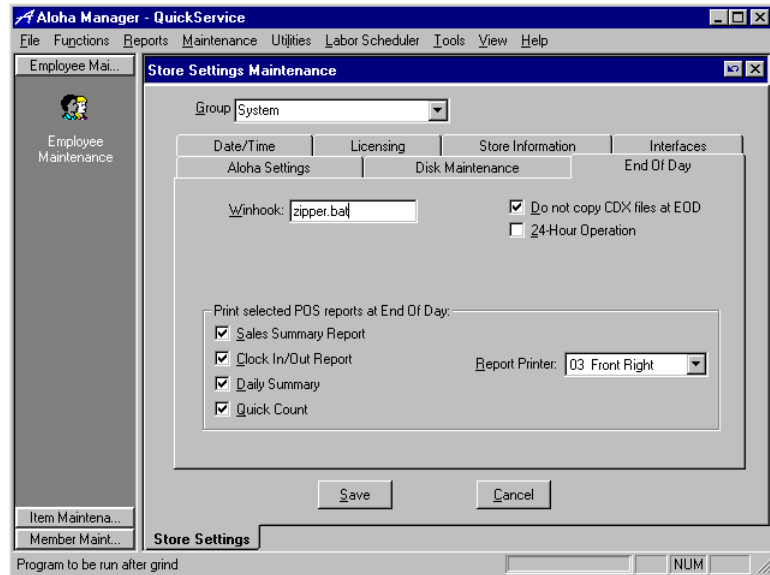


Figure 3-58 System Group, End of Day Subtab

Winhook — Contains the name of a custom batch file to launch following the EOD. Custom batch files allow the automation of certain routines that are outside the Aloha system but that address Aloha data files, such as compressing or zipping data files, and copying them to another drive.

Do Not Copy CDX Files at EOD — Prevents .CDX files from being copied to dated subdirectories at EOD. Two files, ADJTIME.CDX and GND-BREAK.CDX, are copied regardless of this setting.

24-Hour Operation — Indicates the restaurant is open 24 hours per day. This causes all open sales and labor to carry over from one business day to the next during the EOD process. Open checks remain open and carry over to the new business day. Employees are clocked out and clocked back in for a new day of

business, but are not checked out. The Employee Break Report will report the end time as the time that EOD was run.

Print Selected POS Reports at End of Day Inset

Sales Summary Report — Prints the FOH Sales Report at EOD.

Clock In/Out Report — Prints the FOH Clock In/Out Report at EOD.

Daily Summary — Prints the FOH Daily Summary Report at EOD.

Quick Count — Prints the Quick Count Report at EOD.

Report Printer — Denotes the printer in which to print the selected POS reports at EOD.

International

The International group enables you to establish policies for international currency use, taxes, and international date settings. This permits customizing of the system to match local currency requirements. Select Maintenance > Store Settings. Select International from the Group drop-down list. The corresponding subtabs display, with International as the default subtab, as shown in Figure 3-59:

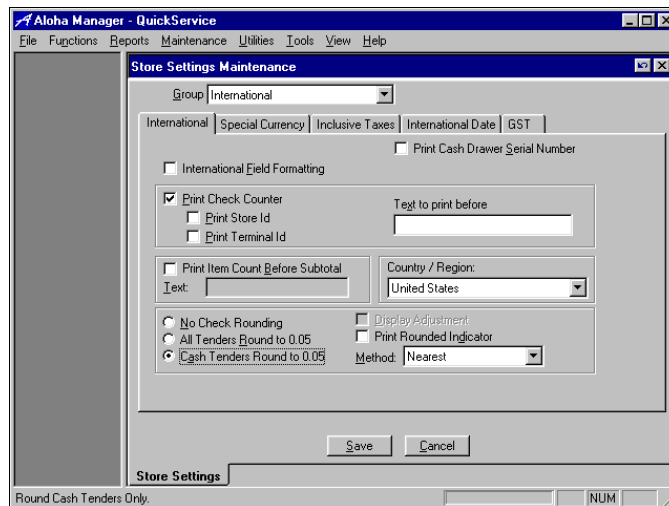


Figure 3-59 International Group, International Subtab

The International group provides the following subtabs: International, Special Currency, Taxes, and International Date.

International Subtab

The International subtab enables you to define international formats, check counter settings, and to define rounding indicators.

International Field Formatting — Allows up to nine alphanumeric characters to be entered in the Social Security Number field. This is important for International countries that do not use the standard nine-digit social security number format.

Print Cash Drawer Serial Number — Prints the cash drawer serial number on top of the cash in/out chit.

Print Check Counter Inset

Use the Print Check Counter inset to set up the perpetual check counter function available to international sites. This function prints a perpetual check number in the top left corner of the guest check.

Once set up, the counter is automatically activated when a guest check is entered on a FOH terminal. A binary file, COUNTER.BIN, is created in the root directory (C:\) on the terminal in which the guest check is generated. All sales information is stored in this file.

The system tracks the following items on each terminal when the counter is activated:

- The total sales generated on a terminal.
- The total number of checks generated from a sale.
- The total number of server checkouts.
- The total number of sales reports printed.

Select from the options located in the Print Check Counter inset to activate the check counter feature and determine the information to print on the guest check:



The perpetual check counter does not roll over at EOD. To reset the counter for a terminal, delete COUNTER.BIN located in the root directory for the corresponding terminal.

Print Check Counter — Enables a check counter that never resets, and prints the sequential number on the guest check.

Print Store ID — Works with the 'Print Check Counter' feature and prints the store ID on the guest check.

Print Terminal ID — Works with the 'Print Check Counter' feature and prints the terminal ID on the guest check.

Text to Print Before — If ‘Print Check Counter’ is selected, specifies the text to print before the sequential number (check number) on the guest check, for example, *Check Number*.

Print Item Count Before Subtotal — Prints the total number of items on the guest check.

Text — Specifies the text to print before the item count number on the guest check, for example, *Item Number*.

Country/Region — Indicates the method to use for expanding data text boxes. This accommodates regions which require extra characters for names, addresses, and phone numbers. Select between United States, United Kingdom, or Universal Format.

No Check Rounding — Displays check totals as the exact check amount, not rounded.

All Tenders Round to 0.05 — Rounds check totals for checks paid by all methods of payment to the nearest nickel. This cannot be selected in conjunction with ‘Cash Tenders Round to 0.05’.

Cash Tenders Round to 0.05 — Rounds check totals for checks paid by cash only to the nearest nickel. This cannot be selected in conjunction with ‘All Tenders Round to 0.05’.

Display Adjustment — Displays the rounding benefit on the guest check. The rounding benefit describes the variance between the sales total and the payments total when using check rounding. The rounding benefit may also be viewed on various reports in BOH.

Print Rounded Indicator — Prints a mark on the check to indicate that the check total is a rounded amount.

Method — Specifies the rounding method to use on the check total. The three specific rounding methods are: Nearest, Up, and Down. The Rounding feature is a global setting, meaning that it applies to all checks and not by employee or job code.

Special Currency Subtab

This subtab enables you to specify special currency regulations, such as the number of digits allowed, the currency symbol, etc. Select the Special Currency subtab from the International group, as shown in Figure 3-60:

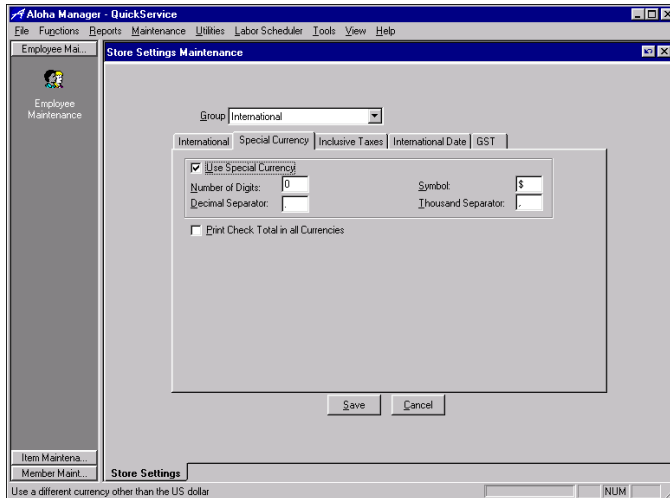


Figure 3-60 International Group, Special Currency Subtab

Use Special Currency — Indicates you are using a currency other than the U.S. dollar. The system overrides the standard decimal and monetary settings and uses values entered on this subtab. Values entered in the International options are ignored unless this check box is selected.

Number of Digits — Specifies the number of digits to the right of the decimal. Although two is the standard for North America, many nations require three digits to the right of the decimal.

Decimal Separator — Denotes the character used to separate whole values from fractional values (dollars versus cents, for example). If custom dictates that the separator is a period, such as in the United States, enter a period in this field.

Symbol — Denotes the symbol that indicates the amount is monetary. North America uses a '\$' while England uses a '£'.

Thousand Separator — Denotes the customary character that is used to separate numbers in thousands. For example, North American custom is to use a comma as the thousands separator; European custom is to use a period.

Print Check Total in all Currencies — Prints the check total in all currencies in use.

Inclusive Taxes Subtab

This subtab enables you to set various tax policies, such as whether to exempt inclusive tax, print tax breakouts, etc. Select the Taxes subtab from the International group, as shown in Figure 3-61:

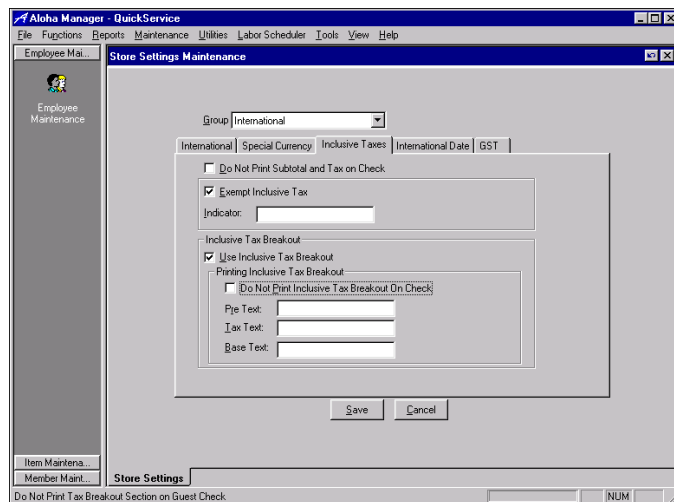


Figure 3-61 International Group, Taxes Subtab

Do Not Print Subtotal and Tax on Check — Disables printing the subtotal and tax on guest checks. Use this option with 'Use Inclusive Tax Breakout'. In European countries, only a total amount is required to print on checks.

Exempt Inclusive Tax — Removes inclusive taxes from the item price.

Indicator — Denotes the character or text to appear on the printed receipt to indicate the inclusive tax has been backed out of the price.

Inclusive Tax Breakout Inset

Use Inclusive Tax Breakout — Enables you to print a breakout of VAT (Value Added Tax) on the guest check. The breakdown separates and describes the pre-tax price and the corresponding tax. The VAT is the predominant tax method in European and Latin American countries and is very similar to inclusive taxes. The tax breakdown is displayed at the bottom of the guest check. Before you can display the VAT breakdown, you must first create the appropriate VAT tax or taxes in Maintenance > Menu > Taxes. Remember that VATs are inclusive taxes. You should not use this feature if exclusive taxes are being used.

Do Not Print Tax Breakout on Check — Omits inclusive tax information from guest checks. It disables printing the subtotal and tax on guest checks. In European countries that use VAT, it is confusing when the subtotal and tax lines print and VAT information prints on the bottom of guest checks.

Pre Text — Contains the text to display before the tax information.

Tax Text — Contains the text to display before the tax amount.

Base Text — Contains the text to display before the item's pre-tax amount.

International Date Subtab

This subtab enables you to specify the format for dates entered into the system. Select the International Date subtab from the International group, as shown in Figure 3-62:

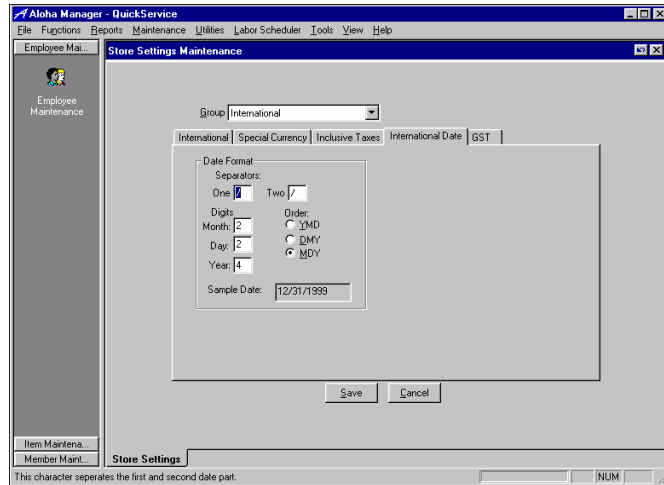


Figure 3-62 International Group, International Date Subtab

Date Format Inset

Separators specify the character to use for separating the month, day of the month, and year. Each separator is one character; the separators do not have to be the same character.

One — Denotes the character to separate the first two fields (such as / or -).

Two — Denotes the character to separate the last two fields.

Month Digits — Specifies the number of digits to display. The default number is two.

Day Digits — Specifies the number of digits to display. The default number is two.

Year Digits — Specifies the number of digits to use for the date. Set this to two or four digits. The default is four digits.

YMD Order — Displays the date with the year first, followed by the month, then the day of the month.

DMY Order — Displays the date with the day of the month first, followed by the month, then the year.

MDY Order — Displays the date with the month first, followed by the day of the month and then the year. This is the default setting.

Sample Date — Displays an example of how dates display throughout the system, based on the selected order option (YMD, DMY, or MDY).

GST Subtab

This subtab enables you to specify GST tax parameters. Select the GST subtab from the International group, shown in Figure 3-63:

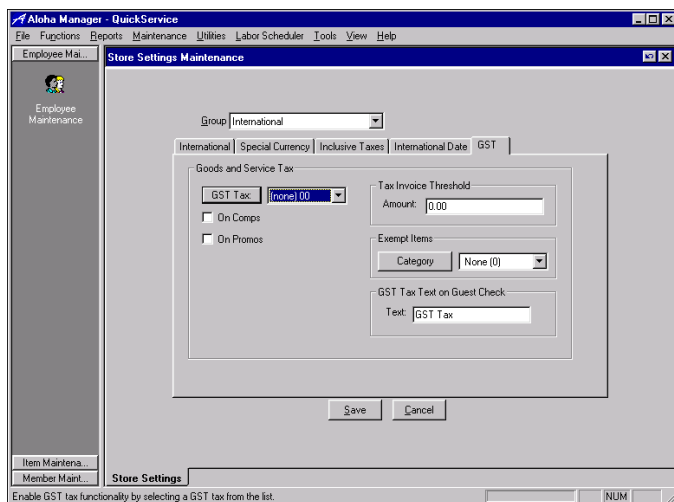


Figure 3-63 GST Subtab

The Goods and Services Tax feature is explained in depth in Chapter 6, Menu Maintenance Functions, GST Taxes.

Credit Card

The Credit Card group enables you to define EDC settings, credit card authorization procedures, and voucher printing. It provides on-line credit card authorization, preauthorization, verification, and settlement of credit card transactions. In addition, it provides a number of built-in management tools, such as real-time transaction tracking, maintaining transaction history files, and customized reporting functions.

Select Credit Card from the Group drop-down list, as shown in Figure 3-64:

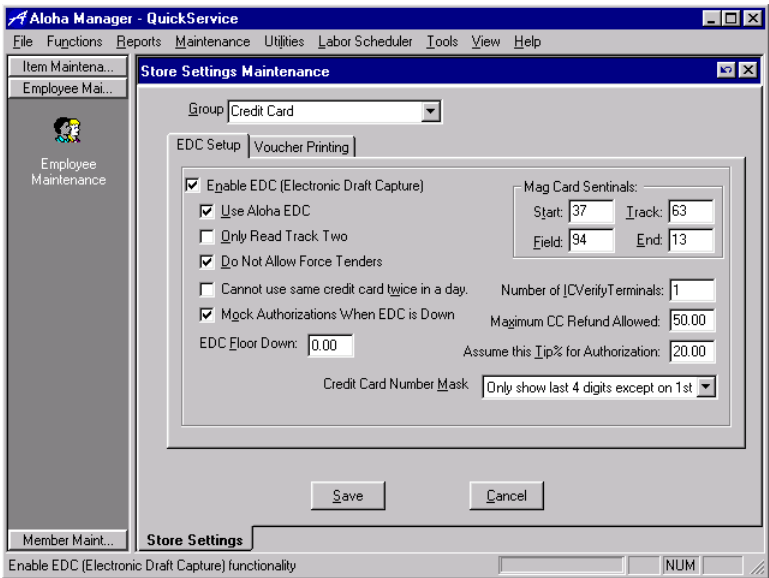


Figure 3-64 Credit Card Group, EDC Setup Subtab



Refer to
ICVerify in
Chapter 2, Functions, for
more information on
ICVerify terminals.

Enable EDC — Activates EDC functionality.

Number of ICVerify Terminals — Specifies the number of ICVerify terminals to use. This text box is typically set to 1.

If you are not using the Aloha EDC software, 'Enable EDC' and 'Number of ICVerify Terminals' are the only check boxes that you must select or enter a value. All other settings refer specifically to the Aloha EDC software. Please refer to the Aloha EDC manual for instructions on the EDC settings and other credit card settings.



Refer to the
Delivery/Fre-
quent Buyer User's Guide for
details on how to configure
delivery setup.

Delivery

The Delivery group enables you to establish delivery order types and policies for operations that offer delivery service. This group will only be listed if you are set up to use Delivery/Frequent Buyer, which is part of the Customer Management Solutions package. Delivery/Frequent Buyer is a program used to track customer's sales history. It also provides the ability to set up different programs to reward the guest, and encourages guests to buy more frequently with the use of coupons and bonus plans.

Gift Card/Certificate Sales

Use the Gift Card/Certificate Sales group to establish the type of gift cards or gift certificates you will be selling. The Aloha system supports the following types:

- Basic Gift Certificates
- Aloha Gift Certificate Manager
- Aloha eCard
- Paymentech
- ValueLink

Basic Gift Certificates is an internal feature within the Aloha system used to track paper gift certificates. The Basic Gift Certificates feature does not require a security key license.

Aloha Gift Certificate Manager is an Aloha BackOffice product and requires a security key license. You can set the rules for gift certificates in advance, making it easier to sell and redeem them. There is no need for forms or manual design and it lets you create or inventory preprinted gift certificates easily. The system tracks each certificate you issue and redeem to reduce the risk of missing certificates and compromising security.

Aloha eCard is a feature of the Aloha Enterprise product to sell and redeem plastic gift cards. It provides an extensive list of features, such as providing the ability to overpay when redeeming, requiring employees to enter gift cards with a mag card reader, and more. With Aloha eCard, you do not need a credit card processor to transfer transactions.

Paymentech is used as a host to sell and redeem plastic gift cards, as well as its own credit card processor. It provides a variety of features for gift cards, such as entering a range of gift cards using the Range feature, offline transactions, and more.

ValueLink is used as a host to sell and redeem plastic gift cards, using either the CES (First Data South) or Nabanco (First Data North) credit card processors. It provides a variety of features, such as enabling preauthorization, offline transactions, and more.



Refer to the Aloha Gift Certificate Manager User's Guide for more information.



Refer to the Aloha QuickService Special Features Guide for more information on setting up gift cards with Aloha eCard, Paymentech, or ValueLink.



Refer to the Aloha Quick Count User's Guide for detailed instructions on setting up and using the Quick Count functionality.

Quick Count

The Quick Count group enables Quick Count functionality and Projection Reports, and to build the projections database. This group is only listed if you are set up to use Quick Count, which is an Aloha add-on. Aloha Quick Count is a simple inventory and reporting package, allowing you to track items and usage on a daily basis. Features like opening counts, add, usage, and waste rate tracking, as well as a complete reporting package, enable you to manage your operation more efficiently and effectively.

Video

The Video group enables you to define remote display system setup, display options, and keypad bump codes. This group will only be listed if you are set up to use remote display systems. Aloha RDS can complement or replace remote order or chit printing in the kitchen or food preparation areas. Menu items that are entered by a server in the FOH can automatically be displayed in the kitchen or other food preparation areas within seconds. Items on order can be assigned to more than one preparation area, depending on the restaurant's preference. After preparing an order, employees in the kitchen or preparation area can bump orders off the video screen by using a connected keypad or bump box. Bumped orders can be recalled as needed.



Refer to the Interfacing RDS with Aloha User's Guide for detailed instructions on setting up your display options and bump codes.



Refer to the
Interfacing
PMS with Aloha User's
Guide for detailed instruc-
tions on hotel and prop-
erty management system
settings.

Hotel

The Hotel group enables you to define Property Management System (PMS) settings. This group will only be listed if you are set up to use the PMS Interface. PMS Interface was developed specifically for the hospitality industry to increase the power of Aloha so it is dynamically linked to a hotel's property management system (PMS). When PMS Interface is installed, the Aloha EDC program is automatically installed on the system to assist the Aloha POS system communicate with the hotel's PMS system. This enables hotel restaurants and cafeterias using an Aloha POS system to inquire about a hotel guest's status, and to charge orders to a room pending hotel approval.

Labor Maintenance Functions

This chapter explains how to create and maintain employee files, job codes, access levels, and other labor related settings.

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Chapter 4

Aloha®

This section discusses the preparation of Labor settings in the Aloha system, and establishes such things as employee and job code information, security access levels, performance measures, and more. Labor is the backbone of a restaurant and must follow certain state and federal regulations. The settings described in this chapter determine which functions the employee performs and restrictions placed on the employee.

Select Maintenance > Labor to access the Labor menu, as shown in Figure 4-1:

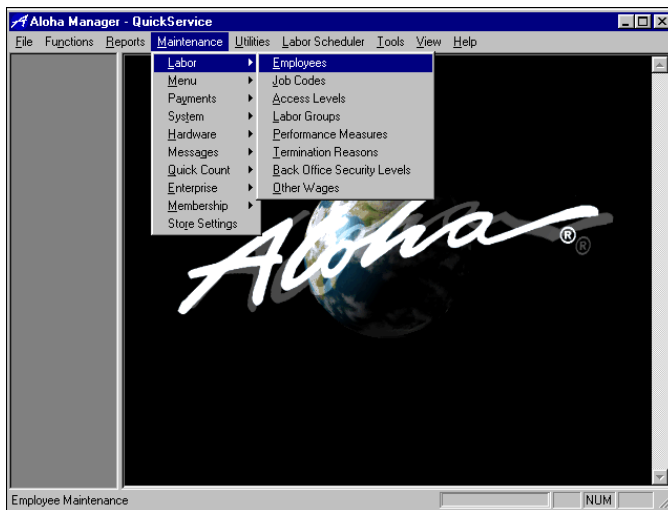


Figure 4-1 Labor Menu

In this chapter you learn how to:

- Enter and edit employee information.
- Assign, enter, and edit job codes.
- Establish access levels for job codes.
- Establish labor groups.
- Define performance measures.
- Establish termination reasons.

- Establish back office security levels and define the functions each security level can access.
- Define other wage types for the administration of paid time off (PTO).

Employees

The Employees function tab contains all pertinent data on current and past employees. Use this function tab to enter, edit, or delete employees, as well as to maintain various settings and records for the employee. Due to certain state laws and labor codes, always terminate employees instead of deleting them from the Aloha system.

Select Maintenance > Labor > Employees to display the Employees function tab, as shown in Figure 4-2:

Figure 4-2 Employees Tab

Number — Holds the employee's name and unique number that identifies each employee. Use this number to log in to the Aloha Front-of-House and to perform certain functions that require approval to continue.



When using the employee number to log in to the FOH system, all leading zeroes must be entered. For example, if the number of employee digits (specified in Maintenance > Store Settings > Security Group > POS Password Settings) is set to four, an employee that has been assigned an employee number of 0523, must enter 0523 in the login screen, not 523.



Refer to the Security group in Chapter 3, Store Settings, for instructions on how to set up employee number specifications.

To add a new employee, enter an unused number from 0001 to 9,999, and press Enter. Create employee numbers in a designed numbering system for organization and manageability. One suggestion is to group employee numbers by their job functions, such as:

0100—0199	Management positions
0200—0499	Counter staff
0500—0599	Prep employees
0600—0799	Kitchen employees
0800—0899	Other employees
0900—0999	Training positions

In this way, employees are easily associated with a specific position within the organization.

To edit an existing employee, scroll through the 'Number' drop-down list, select the employee or employee number, and press Enter.

The Employees function tab provides the following subtabs which are used to maintain employee records: Employee, Job Codes, Zap, Delivery, Tax, and Back Office Security.

Employee Subtab

Use the Employee subtab to enter general employee information, such as the social security number, name, and address.

SSN — Denotes the nine-digit employee's social security number. Hyphens are entered by the system when you advance to the next setting.

Last Name — Holds the employee's last name.

First Name — Holds the employee's first name.

Middle — Holds the employee's middle name.

Nickname — Designates the name printed on the guest check. Use this setting for employees who do not want their real name shown to customers. If left blank, the employee's first name is used.

Birthdate — Holds the employee's date of birth. Enter as mm/dd/yyyy.

Hire Date — Holds the date the employee began working. Enter as mm/dd/yyyy. This is not necessarily the first day the employee worked.

Export ID # — Contains the employee identification number that is recognized by a third party software for electronic payroll processing. For example, enter the employee ADP number for an ADP interface.

Address — Holds the employee's home address. There are two address lines available for entry, if needed.

City/Town — Holds the city in which the employee lives.

State — Holds the state in which the employee lives.

Postal Code — Holds the zip code or Canadian postal code for the employee's home address.

Telephone — Accepts a standard seven-digit telephone number. Enter all ten digits for the phone number and area code.

Prefers Qwerty Keyboard — Designates the standard QWERTY typewriter keyboard is preferred by the employee. Clear the check box to display an alphabetic keyboard layout. These keyboards display on order entry touch screens, and used for data entry, such as typing the name for a bar tab. The QWERTY layout is usually preferred by employees who know how to type.

Must Use Mag Cards — Forces the employee to use a magnetic card when logging in to the FOH, and when accepting credit cards for payment. The employee cannot manually enter their password or credit card numbers. This option is specific to each employee. A global setting is available in Maintenance > Store Settings > Labor. When selected, the 'Mag Card Password' button is enabled.



Select 'Must Use Mag Cards' or 'Must Use Thumb Scanners', but never in conjunction with each other.



Refer to Chapter 8, Hardware Maintenance Functions, for more information on the use of electronic thumb scanners.

Must Use Thumb Scanner - Clock In — Requires the employee to place their thumb on the scanner hardware for identification to clock in. This option is specific to each employee and is suited to employees who must clock in but do not enter orders.

Must Use Thumb Scanner - Log In/JIT — Requires the employee to place their thumb on the scanner hardware for identification to log in. This option is specific to each employee and is suited to order entry employees who log in frequently and to managers who must approve certain functions. Use this feature alone or in conjunction with the 'Must Use Thumb Scanner - Clock In' check box.

Mag Card Password Button

Click Mag Card Password to assign a mag card to an employee. You have the option to update mag cards in the FOH immediately, or after the next system refresh.

To add an employee's magnetic card information:

1. Click **Must Use Mag Cards** to force the employee to use a mag card with the Aloha system. Mag cards can be used even if 'Must Use Mag Cards' is cleared.
2. Click **Mag Card Password**. The Read Magnetic Card dialog box, shown in Figure 4-3 displays:



Figure 4-3 Read Magnetic Card Dialog Box

3. Swipe the employee's **mag card**. You are prompted to re-swipe the mag card to confirm the number, as shown in Figure 4-4:



Figure 4-4 Repeat Mag Card Swipe

4. Re-swipe the employee's **mag card** for confirmation. The Update FOH Now message box displays as shown in Figure 4-5:

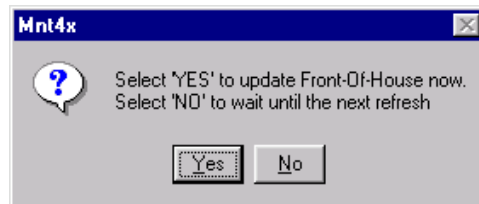


Figure 4-5 Update FOH Now Message Box

5. Click **Yes** to update the FOH with the mag card information immediately. The employee can now use the mag card to log in to the FOH. Click **No** to update the FOH with the next refresh.

Job Codes Subtab

Use the Job Codes subtab to assign job codes, access levels, and pay rates to an employee. Job codes describe what an employee can do and access levels determine if an employee can do it. Pay rates display only on selected reports. Select the Job Codes subtab from the Employees function tab to enter or edit employee job code information, as shown in Figure 4-6:

The screenshot shows the 'Employee Maintenance' window with the 'Job Codes' subtab selected. The window title is 'Aloha Manager - QuickService'. The menu bar includes 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. The 'Employee Maintenance' subwindow has a 'Number' field set to 'Cashier, AM-T1 0100'. Below this are tabs for 'Employee', 'Job Codes', 'Zap', 'Delivery', 'Tax', and 'Back Office Security'. The 'Job Codes' tab is active, displaying a table with three columns: 'Job Codes', 'Access Levels', and 'Rate'. The table has 10 rows. The first row shows 'AM-GenCash (28)' for Job Codes, 'Cashier-1 (20)' for Access Levels, and '0.00' for Rate. The remaining 9 rows show 'None (0)' for both Job Codes and Access Levels, and '0.00' for Rate. At the bottom of the table are buttons for 'Save', 'Cancel', 'Edit', and 'Delete'. Below the table is a tab labeled 'Employees'. At the very bottom of the window, a status bar says 'To edit, press Return; to add, type unused ID and Return.' and a 'NUM' field is visible.

Job Codes	Access Levels	Rate
AM-GenCash (28)	Cashier-1 (20)	0.00
None (0)	None (0)	0.00
None (0)	None (0)	0.00
None (0)	None (0)	0.00
None (0)	None (0)	0.00
None (0)	None (0)	0.00
None (0)	None (0)	0.00
None (0)	None (0)	0.00
None (0)	None (0)	0.00
None (0)	None (0)	0.00

Figure 4-6 Job Codes Subtab



Job Codes and Access Levels must first be defined on their respective function tabs before assigned to an employee. These are discussed later in this chapter.

Job Codes Button

Click Job Codes to access the Job Codes function tab and create new job codes, if necessary. Changing job code information in the function tab changes the job code information for all employees assigned to it.

Job Codes drop-down list — Determines the set of functions the employee performs. Assign up to 10 job codes for each employee. Use these lists for employees with several job positions. Select the job codes, in descending order, starting with the most used job code first.

Access Levels Button

Click Access Levels to access the Access Levels function tab and create new access levels, if necessary. Changing access level information in the function tab changes the access level information for all employees assigned to it.

Access Levels drop-down list — Determines the set of functions the employee can perform without manager intervention. Select the access level to associate with the corresponding job code.

Rate — Holds the base-level hourly rate for the associated job code to the left. Enter the rate as a decimal number or in fractional cents.

Zap Subtab

Use the Zap subtab to terminate employees in the Aloha system, and enter a reason for an employee's termination, as well as add comments as to why an employee is leaving. Select the Zap subtab from the Employees function tab to enter or edit employee termination information, as shown in Figure 4-7:

The screenshot shows the 'Aloha Manager - QuickService' application window. The 'Employee Maintenance' subwindow is open, and the 'Zap' subtab is selected. The 'Number' field is set to 'Cashier_AM-T1 0100'. The 'Terminated' checkbox is checked. The 'Reason #' dropdown is set to '(1) Excessive Tardiness'. The 'Last Day' is '00/00/0000'. The 'Explanation' field is empty. The 'Leave of Absence' section has a 'Return Date' of '00/00/0000'. The 'Transfer' section has a 'Transfer to Unit' of '0'. The 'Employee Move' checkbox is unchecked. At the bottom, there are buttons for 'Save', 'Cancel', 'Edit', and 'Delete'. A status bar at the bottom left says 'To edit, press Return; to add, type unused ID and Return.' and a 'NUM' field is on the right.

Figure 4-7 Zap Subtab



The Termination Reason function tab is discussed in detail later in this chapter.

Terminated — Identifies the employee as no longer working at your restaurant.

Reason # — Identifies the reason for leaving.

Reason # Button

Click Reason # to display the Termination Reason function tab to add or edit termination reasons.

Last Day — Holds the employee's last date worked. Enter the date in mm/dd/yyyy format.

Eligible for Rehire — Indicates the employee is eligible for rehire.

Explanation — Holds comments, such as additional reasons for leaving.

Leave of Absence Inset

Return Date — Denotes the date the employee is expected to return to work, if the employee is out for a period of time due to a leave of absence. Enter the date in mm/dd/yyyy format.

Transfer Inset

Transfer to Unit — Contains the unit number of the location to which the employee is transferring, provided the employee is transferring to another restaurant within the company.

Will Employee Move — Indicates the transfer requires the employee to move.

Delivery Subtab

Use the Delivery subtab to specify delivery fees, the driver license expiration date, and insurance expiration dates for an employee. Select the Delivery subtab from the Employees function tab to enter delivery information, as shown in Figure 4-8:

The screenshot shows the 'Aloha Manager - QuickService' application window. The 'Employee Maintenance' subwindow is open, displaying the 'Delivery' subtab. The 'Number' field is set to 'Cashier_AM-T1 0100'. The subtabs are 'Employee', 'Job Codes', 'Zap', 'Delivery', 'Tax', and 'Back Office Security'. The 'Delivery' subtab contains the following fields: '\$ Driver Fee' (0.00), '% Driver Fee' (0.00000), '\$ Mileage Fee' (0.00), 'DL Exp' (00/00/0000), and 'Insurance Exp' (00/00/0000). At the bottom are 'Save', 'Cancel', 'Edit', and 'Delete' buttons. A status bar at the bottom left says 'To edit, press Return; to add, type unused ID and Return.' and a 'NUM' button is on the right.

Figure 4-8 Employee Delivery Subtab

\$Driver Fee — Represents the dollar amount the employee receives for each delivery.

% Driver Fee — Represents the percentage of merchandise charges the employee receives for each delivery.

\$Mileage Fee — Represents the dollar per mile reimbursement the employee receives for each delivery.

DL Exp — Holds the employee's driver license expiration date in mm/dd/yyyy format. It is the manager's responsibility to monitor expired dates.

Insurance Exp — Holds the employee's automobile insurance expiration date in mm/dd/yyyy format. It is the manager's responsibility to monitor expired dates.

Tax Subtab

Use the Tax subtab to enter employee information for tax filing purposes and to track additional user-definable information. Select the Tax subtab from the Employees function tab to enter tax information for the selected employee, shown in Figure 4-9:

The screenshot shows the 'Employee Maintenance' window with the 'Tax' subtab selected. The window has a menu bar (File, Functions, Reports, Maintenance, Utilities, Labor Scheduler, Tools, View, Help) and a toolbar (Tools, OS). The 'Number' field is set to 'Cashier 0101'. The 'Job Status' dropdown is set to '(0) Full-time'. The 'Marital Status' dropdown is set to '(1) Single'. The 'Sex' section has radio buttons for 'Male' (selected) and 'Female'. The 'Number of Dependents' field is set to '0'. There are five 'Undefined Code' fields, all set to '0'. At the bottom, there are buttons for 'Save', 'Cancel', 'Edit', and 'Delete'. A status bar at the bottom reads 'To edit, press Return; to add, type unused ID and Return.' and 'NUM'.

Figure 4-9 Employee Tax Subtab

Job Status — Denotes whether the employee is Full-time, Part-time, Hourly, Salary-Exempt, or Salary-Nonexempt. The default is Full-time.

Marital Status — Specifies the employee's marital status.

Dependents — Denotes the number of dependants the employee claims.

Sex Inset

Male — Indicates the employee is male. Male is the default setting.

Female — Indicates the employee is female.

Other Employee Codes Inset

Use the undefined employee codes to track additional information, such as whether the employee is a smoker, owns a car, and other information. To define the text to appear on the subtab in place of 'Undefined code x', edit the EMPITEXT through EMP5TEXT variables in the ALOHA.INI file. For example, to track the number of smokers you employ, edit ALOHA.INI and replace 'Undefined code 1' in the EMPITEXT variable with 'Smoker'. The word 'Smoker' will appear in Employee Maintenance. The Aloha system does not use the information on any Aloha reports.

Undefined Code #1 through 5 — Captures additional information about the employee. Once you define the undefined employee code, the text you set in ALOHA.INI becomes the text for the text box.

Back Office Security Subtab

Use the Back Office Security subtab to define the security level of access to logging in to the BOH. Assign security levels only to employees who perform BOH maintenance, such as managers. Select the Back Office Security subtab from the Employees function tab to enter or edit back office security information for the selected employee, as shown in Figure 4-10:

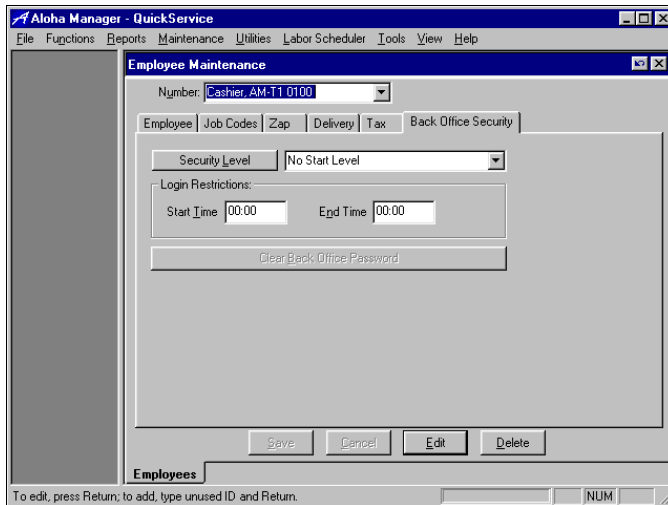


Figure 4-10 Back Office Security Subtab

The information entered here relates to the security level access given to each employee.

Security Level — Determines the access the employee has to BOH functions. Security Levels are defined in Labor > Employees > Back Office Security Levels.

Security Level Button

Click Security Level to access the Back Office Security Levels function tab and create or edit security levels as needed. Changing the security level in the Back Office Security Levels function tab changes the selected security level access for each employee assigned to that security level.



The Back Office Security Levels function tab is discussed in detail later in this chapter.

Login Restrictions

Refers to a 24-hour time interval the employee is allowed to access the BOH. For example, the start time may be entered as 08:30, representing 8:30 a.m., and the end time may be entered as 15:00, representing 3:00 p.m. If the start time and end time are left at 00:00, the employee can access the BOH at any time.

Start Time — Start time of day when the employee can access the BOH.

End Time — End time of day when the employee can access the BOH.

Clear Back Office Password Button

Click Clear Back Office Password to remove the password used by an employee to log in to the BOH. The next time the employee logs in to the BOH, they receive a prompt to enter a new password.

Job Codes

Job codes are user-defined job descriptions that categorize employees and tasks into logical groupings. They describe what the employee can do. Use this function to define the tasks for each job code, as you would do when writing a job description. For example, kitchen employees typically do not have order entry privileges (the Order Entry check box is cleared).

Select Maintenance > Labor > Job Codes to display the Job Codes function tab, which defaults to the Job Codes subtab, as shown in Figure 4-11:

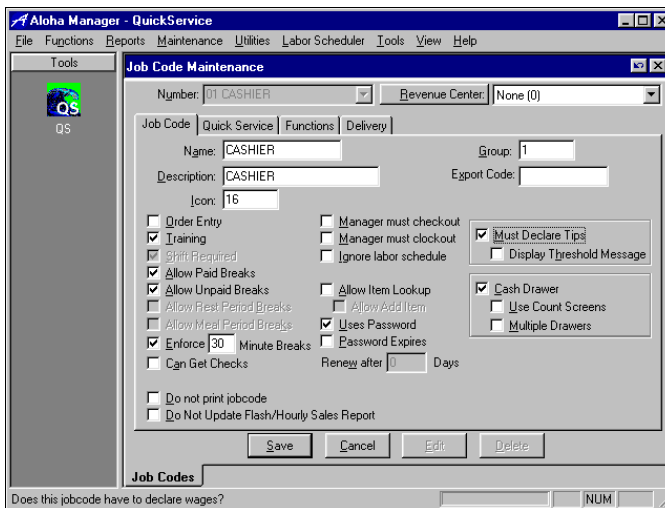


Figure 4-11 Job Codes Function Tab

Number — Holds the name and a unique number that identifies each job code. To add a new job code, enter an unused number from 001 to 999, and press Enter. To edit an existing job code, scroll through the 'Number' drop-down list, select the job code, and press Enter.

Revenue Center — Attaches a job code to a specific revenue center. Select a revenue center from the drop-down list if the Hourly Sales and Labor report needs to be determined on a per revenue center basis for each job code. When you generate the Hourly Sales and Labor report, select the ‘Split Hourly Sales and Labor by Revenue Center’ check box. Revenue center information is entered in Maintenance > System > Revenue Centers.



Each job code is assigned to a revenue center. If a revenue center is not assigned, the values on the Hourly Sales and Labor Report display incorrectly.

Revenue Center Button

Click Revenue Center to access the Revenue Center Maintenance function tab to create or edit revenue centers, as needed.

The Job Codes function tab provides the following subtabs which are used to maintain job code records: Job Code, Quick Service, Functions, and Delivery.

Job Code Subtab

Use the Job Code subtab (Figure 4-11) to create jobs and to assign functions to those jobs.

Name — Holds the abbreviated form, up to 10 characters, of a job title.

Description — Holds the full name, up to 20 characters, of a job code.

Icon — Associates a specific bitmap with a job code. Bitmaps display on order entry terminals, and serve as a visual representation of the job code. This is particularly useful when an employee is assigned to more than one job code. The available bitmap images are stored in the ALOHA\BMP directory, labeled 'Icon##', with ## representing the number to enter in this text box.

Customized job code bitmaps can be created for use on order entry terminals. Examples are shown in Figure 4-12:

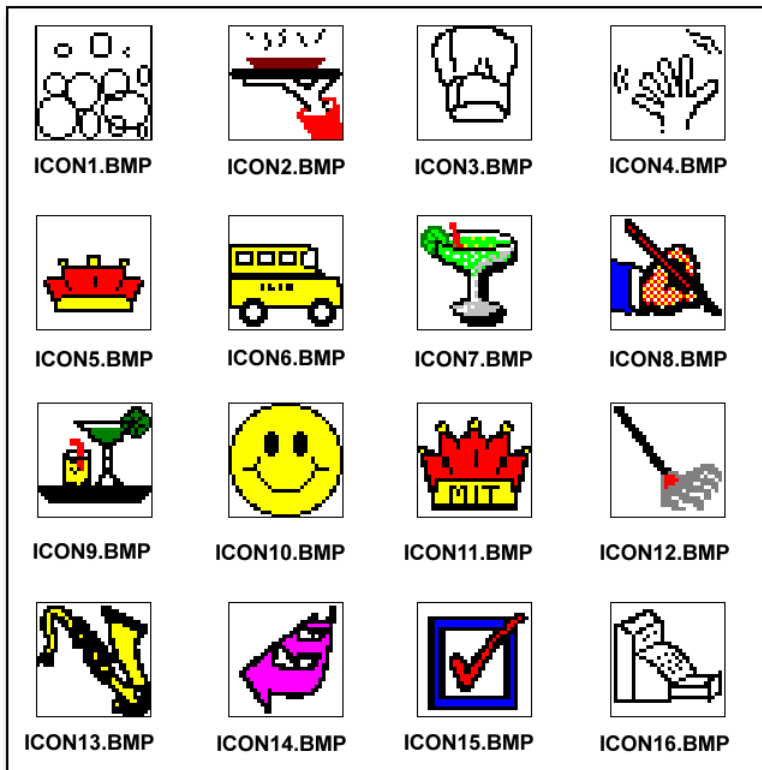


Figure 4-12 Customized Job Code Icons

Group — Designates a two-digit number used in conjunction with the Event Scheduler located in Maintenance > System > Events. Assign a different number to each job code. To group certain job codes together, assign them the same number. Then use Event Scheduler to assign specific menus to designated Job Groups. Use this feature when different job codes need to access different menus.

Export Code — Associates a secondary job code, used by a third party software system or the labor report, with the equivalent job code in the Aloha system. This text box holds 10 characters.

Order Entry — Signifies that order entry screens are displayed for all employees with this job code. If this check box is cleared, employees with this job code do not have access to order entry screens and cannot ring sales or close checks. This option requires the 'Shift Required' check box to be selected. It also labels the employee as a server in regards to menu assignment, events, and customer polling functionality.

Training — Signifies the employee is in a training status. Employees with this job code have access to all rights and privileges provided by other check boxes, but sales and other data are not saved. This is an emulation mode, and any activity creates temporary data that has no impact on the system. Order chits, guest checks, and checkouts have bold disclaimers identifying them as training mode. When an employee is working in this mode, checks are displayed in green instead of blue on order entry terminals.

Shift Required — Requires that employee must clock in and clock out at the beginning and end of every shift, and gives the employee access to employee and manager functions. This check box does not enable order entry capabilities unless selected in combination with the 'Order Entry' check box.

Allow Paid Breaks — Enables a new button on the FOH Employee Break screen called Start Meal Period Break

Allow Unpaid Breaks — Enables a new button on the FOH Employee Break screen called Start Unpaid Break.

Meal Period Breaks — Enables the employee to take meal period breaks, when activated by the 'Use Break Rules' option on the Breaks subtab in Store Settings > Labor.

Rest Period Breaks — Enables the employee to take rest period breaks, when activated by the 'Use Break Rules' option on the Breaks subtab in Store Settings > Labor.



Refer to the
Enforce

Unpaid Break Time feature in Chapter 3, Store Settings, for more information.

Enforce ___ Minute Breaks — Defines a specified number of minutes, between 1 and 999, of unpaid break time the employee must take. This option is available only when you select ‘Allow Unpaid Break’ or ‘Allow Meal Period Break’. For example, if company policy dictates all employees take a 20 minute break, type 20 minutes. The employee can not return from the break until the 20 minute time frame elapses unless the manager has the ability to override the early break return.

Manager Must Checkout — Prompts for manager authorization before the employee can perform a checkout.

Manager Must Clockout — Prompts for manager authorization before the employee can clockout.



Any employee assigned to an access level with ‘Approve Checkout’ or ‘Approve Clockout’ selected can authorize the employee to perform the corresponding function, however, these check boxes are normally reserved for manager access levels only.

Uses Password — Requires the employee enters a password at login.

Do Not Update Flash/Hourly Sales Report — Prevents the job code's labor hours and dollars from being included in the Flash report and Hourly Sales report in FOH and BOH. For example, excluding the manager could give the report a more realistic total if their pay is higher than other employees.

Do Not Print Jobcode — Prevents the job code from printing on the following reports:

- ADP export file
- Coconut Code export file
- Real World Payroll export file
- Labor Report
- OT Warning Report

Allow Item Lookup — Enables you to look up any item defined in Maintenance > Menu > Items. You must also add a button to a panel with the Item Lookup button function in Maintenance > Menu > Panel Editor. To order the item after you look it up, select the Allow Add Item check box.

Allow Add Item — Enables you to add an item after you have looked it up using the Item Lookup feature. You must select this in conjunction with the ‘Allow Item Lookup’ check box. When ordering, forced modifiers accompany the item as normal.

Ignore Labor Schedule — Enables employee to clock in without actually being scheduled to work any specific hours. This is often used for managers and other exempt employees.

Password Expires — Sets the password code to expire. Upon expiration, the employee must select another password for use.

Can Get Checks — Enables the employee to get open checks from other employees. Use this primarily in a cashier environment where cashiers close checks opened by another employee.

Renew After _ Days — Specifies the number of days to pass before a password must be changed. Use this only if ‘Password Express’ is selected.

Must Declare Tips

Must Declare Tips — Requires employee to declare tips upon checking out.

Display Threshold Message — Displays a warning message when employee declares tips less than the defined threshold, or minimum, amount.



The tips threshold is user defined in Store Settings > Financials > Reports.

Cash Drawer Inset

Cash Drawer — Enables assignment of a cash drawer to the employee. Use this setting for employees who manage cash drawers, such as cashiers. The most employees you can assign to a cash drawer is one.

Use Count Screens — Enables the employee to use a money counter to enter or confirm their starting bank.

Multiple Drawers — Enables assignment of the employee to more than one cash drawer at a time. Select 'Cash Drawer' to enable this check box.

QuickService Subtab

The QuickService subtab allows you to further define the functions and tasks for a selected job code. Select the QuickService subtab from the Job Codes function tab to assign order entry screens and queues, and other job code tasks and functions, as shown in Figure 4-13:

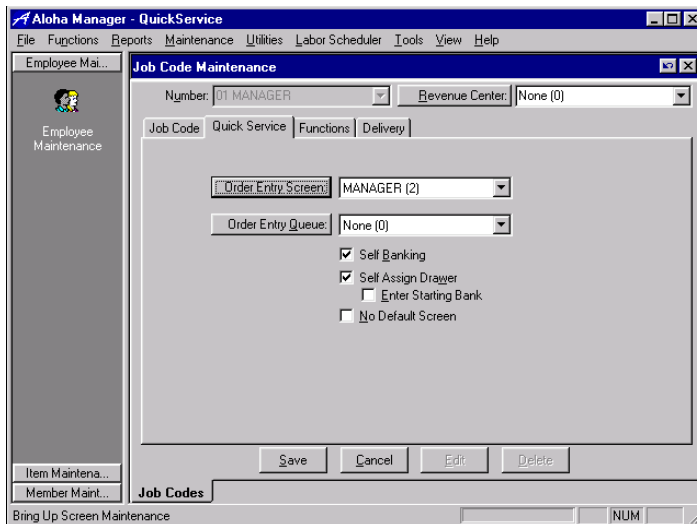


Figure 4-13 Quick Service Subtab

Order Entry Screen Button

Click Order Entry Screen to access the Screen Editor function tab. Here you can perform maintenance to screens and panels.

Order Entry Screen — Indicates the order entry screen the employee receives upon log in.

Order Entry Queue Button

Click Order Entry Queue to access the Order Entry Queues function tab. Here you can perform maintenance to order queues, including adding a record if the one you need is not already there.

Order Entry Queue — Indicates the order entry queue the employee uses upon log in.

Self Banking — Assigns cash accountability to an employee without being assigned to a specific cash drawer.

Self Assign Drawer — Enables employees to assign themselves to their own cash drawers, as well as assign themselves a starting balance at the beginning of their shift.

Enter Starting Bank — Enables an employee who has assigned himself a drawer to enter a starting balance at the beginning of his shift.

No Default Screen — Ensures employees assigned to the selected job code are not assigned to a default order entry screen. When an employee assigned to this job code with this option selected logs into the system, the terminal's default order screen displays.

Functions Subtab

Use the Functions subtab to define checkout details for a selected job code, such as whether an employee must declare their cash at the end of a shift. Select the Functions subtab from the Job Codes function tab to select checkout options, as shown in Figure 4-14:

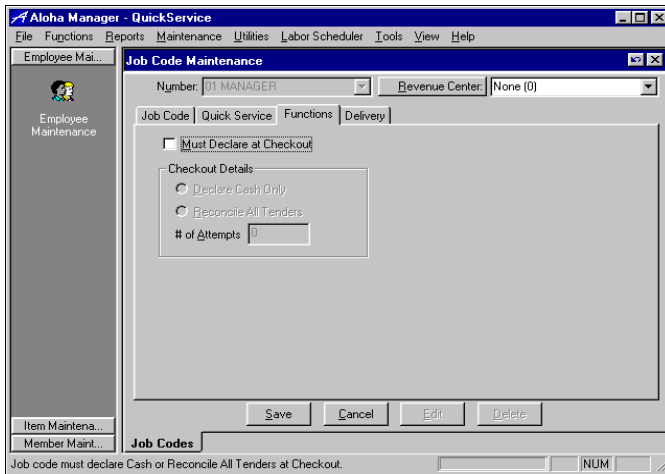


Figure 4-14 Functions Subtab

Must Declare at Checkout — Requires employee to declare cash from the FOH at the end of each shift.

Checkout Details Inset

Declare Cash Only — Requires employee to declare cash only at the end of each shift. This is for over/short calculations.

Reconcile All Tenders — Requires employee to reconcile all cash and non-cash tenders at the end of each shift.

of Attempts — Sets the number of attempts at reconciliation allowed to declare tenders before manager intervention is required.

Delivery Subtab

Use the Delivery subtab to define the delivery tasks for a selected job code, and to interface with Delivery/Frequent Buyer. Refer to the Delivery/Frequent Buyer manual for more information on delivery settings.

Access Levels

Access Levels control security settings and the corresponding rights and privileges assigned to each security access code. They determine IF the employee can perform a certain function without manager approval. In addition to the check boxes in Job Codes, these options further define job functions, but more importantly, they control who can perform certain functions.

Select Maintenance > Labor > Access Levels to display the Access Levels function tab, as shown in Figure 4-15.

Level — Holds the description and a unique two-digit number that identifies each access level. To create a new access level, enter an unused number, and press Enter. To edit an existing access level, scroll through the Level drop-down list, select the level to edit and press Enter.

Description — Holds the full name, up to ten characters, for the access level.

Reports Subtab

Use the Reports subtab, as shown in Figure 4-15, to allow employees assigned to the access level the ability to view certain FOH reports.

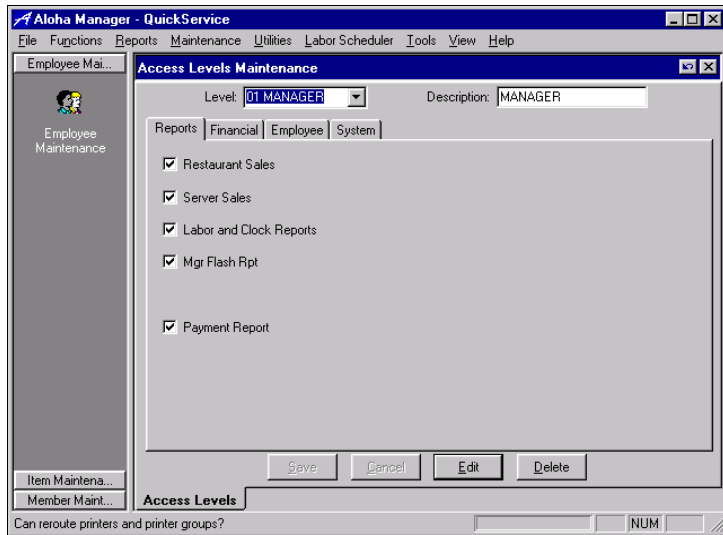


Figure 4-15 Access Levels Function Tab

Restaurant Sales — Enables the employee to run the FOH Restaurant Sales Report from the FOH terminal.

Server Sales — Enables the employee to run the FOH Server Sales report from the FOH terminal.

Labor and Clock Reports — Enables the employee to run the FOH Labor report and clock in and clock out reports from the FOH terminal.

Mgr Flash Rpt — Enables the employee to run the FOH Flash report from the FOH terminal.

Payment Report — Enables the employee to run the FOH Payment report from the FOH terminal. This report prints only credit card payments.

Financial Subtab

Select Labor > Access Levels > Financial to display the Financial subtab, shown in Figure 4-16:



Figure 4-16 Access Levels Financial Subtab

Assign Promo — Enables employee to apply manager-level promotions to guest checks. This is generally reserved for managers.

Delete Promo — Enables employee to delete a promotional item directly from the check.

Assign Comp — Enables an employee to apply manager-level comps to guest checks. This is generally reserved for managers.

Delete Comp — Enables an employee to delete a comp directly from the check.

Assign Day Part — Enables an employee to manually set the current meal period. Select 'Manual Day Parts' check box in Maintenance > Store Settings > Security > POS Security subtab in combination with this check box.

Reopen Check — Enables an employee to reopen a check that has been closed for any employee.

Reprint Check — Enables an employee to reprint clockouts, checkout reports, and guest checks.

Void Items — Enables an employee to void ordered items already on a check for any employee. The manager password prompt displays. If this option is selected, the employee enters their own password, and then enters the void reason to complete the void. If this is cleared, a manager enters their password, and then enter the void reason. The void reason displays on the Void Report.

Cash Drawers — Enables an employee to access cash drawer management and petty cash functions.

Override Category Limits — Enables an employee to enter more than the number of items defined in the 'Max per Check' text box in Maintenance > Menu > Categories, or to enter their employee number in the Manager Approval screen to approve the entry when more items are entered than defined in 'Max Per Check'.

Adjust Payments — Enables an employee to make adjustments to payments, comps, or promos for any employee. This is generally reserved for a manager.

No Sale — Enables an employee to access the 'No Sale' function in the FOH.

Cash Refunds — Enables an employee to issue cash refunds.

Non-Cash Refunds — Enables an employee to issue refunds for non-cash tenders other than credit cards. Examples include: room charges, accounts receivable charges, and gift certificates.

CC Refunds — Enables an employee to issue credit card refunds.

Manual Card # — Enables the employee to bypass the Manager Approval screen that normally displays when they attempt to manually enter a credit card or gift card number. The Manager Approval screen displays if you select ‘Use Magnetic Card Only’ in Maintenance > Payments > Tenders > Type subtab, or ‘Use Mag Card Only’ in Maintenance > Store Settings > Gift Card/Certificates Sales group.

Force Auth — Enables an employee to force authorization on credit card and gift card payments.

Employee Subtab

Select Labor > Access Levels > Employee to display the Employee subtab, as shown in Figure 4-17:

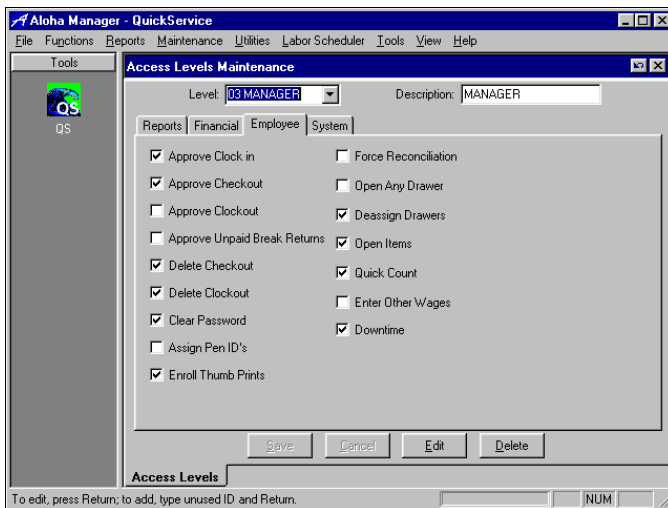


Figure 4-17 Access Levels Employee Subtab

Approve Clockin — Enables an employee to approve clockin transactions.

Approve Checkout — Enables an employee to approve checkout transactions.

Approve Clockout — Enables an employee to approve clockout transactions.



Refer to the
Enforce Break
Time feature in Chapter 3,
Store Settings, for more
information.

Approve Break Returns — Enables an employee to approve an early break return. You define the number of minutes in the 'Enforce ____ Minute Breaks' check box in Maintenance > Labor > Job Codes.

Delete Checkout — Enables an employee to delete checkout transactions.

Delete Clockout — Enables an employee to delete clockout transactions.

Clear Password — Enables an employee to clear passwords for other employees. This setting is generally selected for managers.

Assign Pen ID's — Enables an employee to assign Pen IDs to other employees for system access.

Enroll Thumbprints — Enables an employee to assign login system access, via thumbprint scanner system, to employees.

Force Reconciliation — Enables an employee to force reconciliation, even if the number of attempts at reconciliation exceeds the number specified in that employee's job code. This is generally reserved for a manager.

Open Any Drawer — Enables an employee to open cash drawers associated with a specific terminal. A reason for opening the drawer is required. The event is recorded like the No Sale event, and displays in the audit log.

Deassign Drawers — Enables an employee to deassign employees from their assigned cash drawers. This is typically a manager function.

Open Items — Enables an employee to ring up open items on the FOH.

Quick Count — Enables an employee to access Quick Count screens and reports on the FOH and BOH.

Enter Other Wages — Enables an employee to enter other wages from the FOH manager screen.

Downtime — Enables an employee to transfer the BOH system to another computer.

System Subtab

Select Labor > Access Levels > System to display the System subtab, as shown in Figure 4-18:

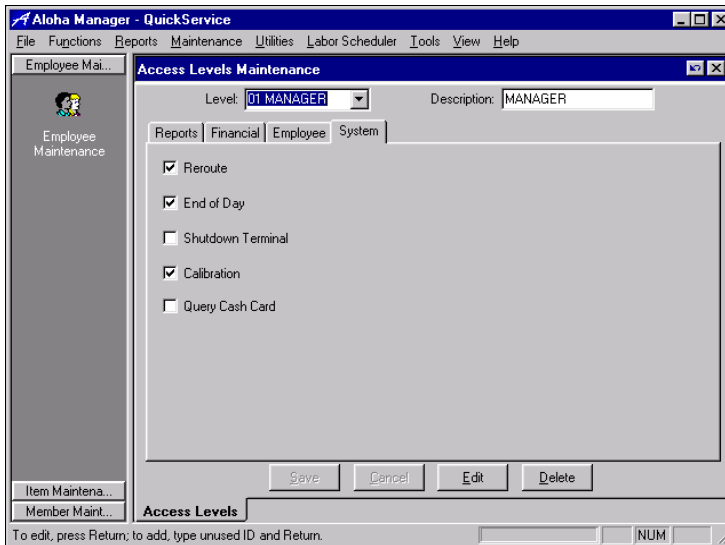


Figure 4-18 System Subtab

Reroute — Enables an employee to reroute printers, printer groups, or remote display systems.

End of Day — Enables an employee to run EOD functions from FOH terminals.

Delete Comp — Enables an employee to delete a comp directly from the check.

Shutdown Terminal — Closes the FOH, then goes directly to the Windows 95 shutdown screen. This applies only to terminals running Microsoft Windows® 95 and prevents employees from simply turning off the machine, which could cause data corruption.

Calibration — Enables an employee to calibrate the touch-screen server terminals.

Query Cash Card — Enables an employee to query the balances of cash cards.

Labor Groups

Labor Groups are sales categories and job codes combined for reporting purposes. These are used by management as a tracking and analysis tool. Only the existing sales categories and job codes are available for selection.

Select Maintenance > Labor > Labor Groups to display the Labor Groups function tab, as shown in Figure 4-19:

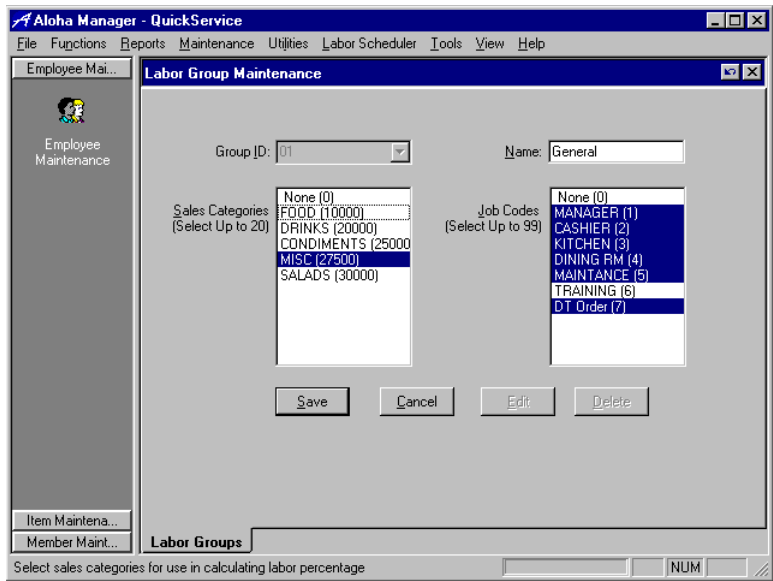


Figure 4-19 Labor Groups Function Tab

Group ID — Holds the name and a unique two-digit number that identifies each labor group. To create a new labor group, enter an unused number and press Enter. To edit an existing labor group, scroll through the Group ID drop-down list, select one to edit and press Enter.

Name — Represents the description assigned to a labor group.



Refer to Chapter 5, Menu Maintenance Functions, for more information on categories.

Sales Categories — Lists the categories available to place in the selected labor group. To remove a category from the selected labor group, click it again. Select up to 20 sales categories per labor group. The categories listed are the sales categories found in Maintenance > Menu > Categories.

Job Codes — Lists the job codes to place in the selected labor group. To remove a category from the selected labor group, click it again. Select up to 99 job codes per labor group. The available job codes are found in Maintenance > Labor > Job Codes.

Performance Measures

Use the Performance Measures function tab to set profiles for sales targets and comparisons to track employee performances against the objectives of each performance measure. Define up to 99 performance measures. These measures display for the current day in the FOH Server Sales report and checkout report. Each profile can have one check box selected to govern how the measurements are calculated.

Select Maintenance > Labor > Performance Measures to display the Performance Measures function tab, as shown in Figure 4-20:

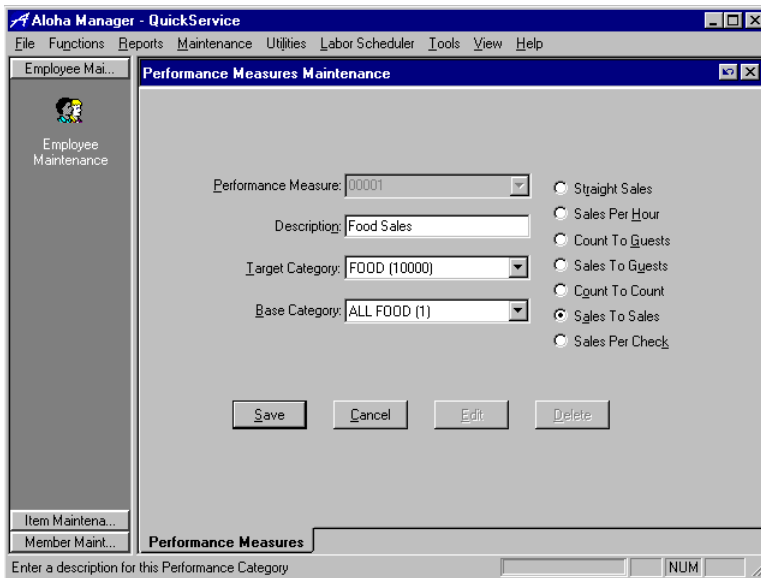


Figure 4-20 Performance Measures Maintenance

Performance Measure — Holds the description and a unique five-digit number that identifies each performance measure. To create a new performance measure, enter an unused number and press Enter. To edit an existing performance measure, scroll through the Performance Measure drop-down list, select one to edit and press Enter.

Description — Holds a description, up to 15 characters, that identifies the performance measure.

Target Category — Represents the item category to use in performance calculations.

Base Category — Compares against the target category when 'Count To Count' or 'Sales To Sales' is selected.

Straight Sales — Provides a sales count and total in dollars of the target category.

Sales per Hour — Provides a sales per hour figure (in dollars) of the target category.

Count to Guests — Provides a total count of the target category divided by the number of guests served.

Sales to Guests — Provides total sales of the target category divided by the number of guests served.

Count to Count — Compares target category count to base category count.

Sales to Sales — Compares target category sales to base category sales.

Sales per Check — Calculates sales per check of items in the target category.

Termination Reasons

Use the Termination Reasons function tab to establish up to 50 termination reasons, which are used in the Employee function tab to document why an employee left the company.

Select Maintenance > Labor > Termination Reasons to display the Termination Reasons function tab, as shown in Figure 4-21:

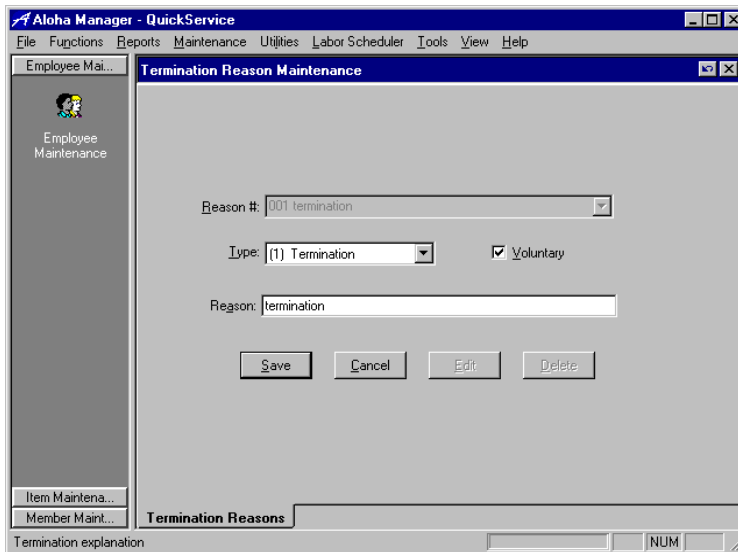


Figure 4-21 Termination Reason Function Tab

Reason # — Holds the reason and a unique three-digit number that identifies each termination reason. To create a new termination reason, enter an unused number and press Enter. To edit an existing termination reason, scroll through the Reason # drop-down list, select the reason to edit and press Enter.

Type — Contains a selection list of reason types, such as Termination, Leave of Absence, and Transfer.

Voluntary — Indicates the listed reason is a voluntary termination.

Reason — Represents the long description of the termination number.

Back Office Security Levels

Use the Back Office Security Levels function tab to create security levels to provide employees access to functions located in the back-of-house. Select various functions in which to give run, add, edit, and delete permissions.

Select Maintenance > Labor > Back Office Security Levels to display the Back Office Security Levels function tab, as shown in Figure 4-22:

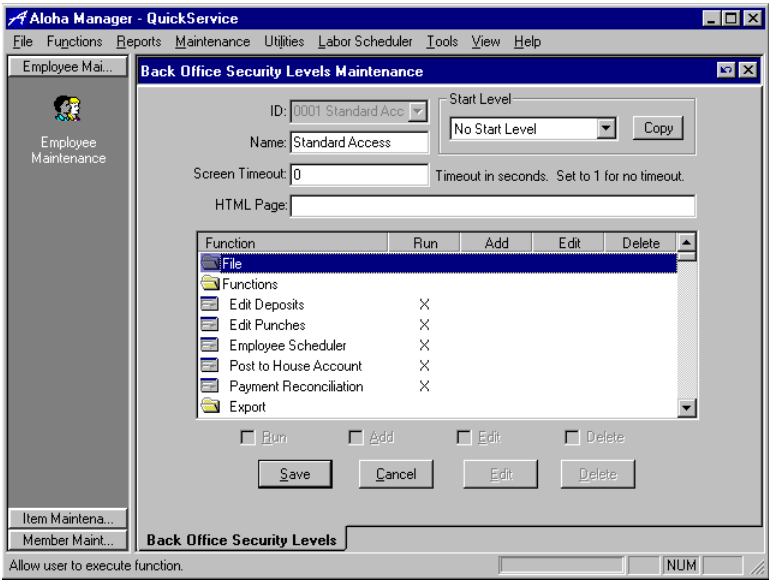


Figure 4-22 Back Office Security Levels Function Tab

ID — Holds the name and a four-digit number that together with 'Name' uniquely identifies each back office security level. To create a new level, enter an unused number and press Enter. To edit an existing level, scroll through the ID drop-down list, select the level to edit, and press Enter.

Name — Specifies a unique name and should be descriptive of the type of level.

Screen Timeout — Denotes the number of seconds before access to the BOH times out from inactivity. Once the screen times out, employees must log in again to re-gain access. Enter 1 if you do not want the BOH to time out.

HTML Page — Holds the path to the HTML page, if the selected security level is associated with an HTML page.

Function — Contains all BOH security functions.

Run — Enables the employee to access and view the selected function.

Add — Enables the employee to add records to the selected function.

Edit — Enables the employee to edit records in the selected function.

Delete — Enables the employee to delete records from the selected function.

Start Level Inset

Start Level — Displays existing security levels to use with the copy function to change the access of existing levels or create new levels. To create a new security level, choose an existing security level from the drop-down list that contains most or all the security access functions the new level should contain. Click Copy. The prompt shown in Figure 4-23 displays:

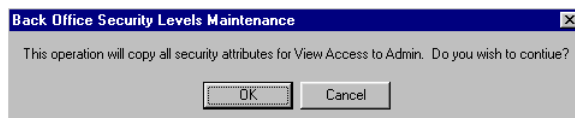


Figure 4-23 Back Office Security Attributes Copy Confirmation

Click OK to copy the security level access settings from the existing security level to the new security level. The new security level contains all functions from the copied security level. Enter a new security level ID and name to identify the new level. Complete any additions or deletions of security functions to the new level by selecting the function from the Functions list and selecting the appropriate options from the Security Level inset box.

Copy Button


Used to copy the security level specified in Start Level to a new security level.

Other Wage Types

Use the Other Wages feature to manually enter and edit PTO in the form of sick, holiday, or vacation time for your employees. Calculate the PTO pay in hours, dollar amounts, or both. In addition, you can set parameters for system generated adjustments relating to meal and rest period breaks, split shift premiums, and others. Enter other wages from either the FOH or the BOH, with appropriate access.

The Other Wages feature uses wage types you define. In addition to sick pay, holiday, and vacation pay, here are some examples of PTO wage types:

Name	Description
Bonus	Pay for bonus hours or dollar amount.
Bereavement	Pay for funeral leave.
Jury Duty	Pay for jury service.
Training	Pay for time spent while employee is in training.
Cash Tips	Dollar amount or hours employee is given for tips.
Adjustments	Pay adjustment to correct a previous error, deduct an authorized deduction, or any other adjustment needed.



Check the wage and payday laws for your state to ensure your policies and procedures are in compliance. It is recommended that any adjustments to wages be authorized in writing by the employee and the supervisor.

Establish wage types in Maintenance > Labor > Other Wages. The Other Wages dialog box displays, as shown in Figure 4-24:

Figure 4-24 Other Wages



Refer to the Edit Punches section in Chapter 2, Functions, for more information about managing PTO.

Wage Type# — Holds the description and a unique four-digit number that identifies each wage type. To create a new type, enter an unused number and press Enter. To edit an existing type, scroll through the ID drop-down list, select one to edit, and press Enter.

Description — Allows user to enter a descriptive name to be used on screens.

Short Name — Allows user to define a descriptive name to be used on reports.

Export ID — Allows user to define a unique code for each wage type for exporting in third party software application interfaces.



Your wage type parameters and pay procedures should reflect the company policies defined and supported by your establishment.

Type Inset

Type — Enables you to configure a wage type that calculates by number of hours, dollar amount, or both.



If you identify a wage type as one that calculates by hours, the 'Amount' text box is disabled when PTO records are added. Likewise, if you identify a wage type as one that calculates by a set dollar amount, the 'Hours' text box is disabled when PTO records are added. If you identify a wage type as one that calculates by both hours and amount, both text boxes are enabled when a PTO record for that wage type is added.

Edit Punch Reasons

Use the Edit Punch Reasons function to define specific reasons to use when editing a punch on the BOH and FOH. For example, if you commonly edit a punch for employees who forget to clock in, you can define an edit punch reason stating ‘Employee forgot to clock in’. The reason appears with the corresponding punch on the Edited Punches report. You must select ‘Use Edit Punch Reasons’ in Maintenance > Store Settings > Labor Group > Employee Settings subtab to activate the feature.

Select Maintenance > Labor > Edit Punch Reasons. The Edit Punch Reasons function tab displays, as shown in Figure 4-25:

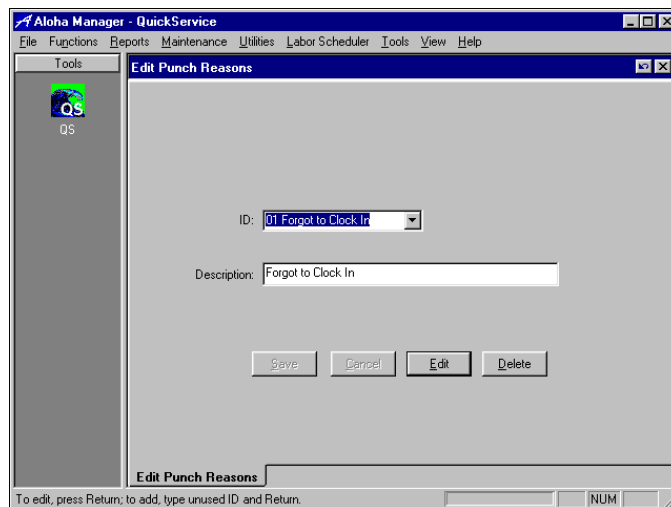


Figure 4-25 Edit Punch Reasons Function Tab

ID — Holds the name and unique number that identifies each edit punch reason. Enter a number up to 99.

Description — Describes the reason for the punch up to 40 characters of text, such as ‘Forgot to clock in’ or ‘Returned early’.

Menu Maintenance Functions

This chapter outlines creating items, setting up menus, and using Panel Editor. Topics include modifiers, categories, and taxes and how they interact with the menu system.

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Chapter 5

Aloha®

The Aloha Menu system offers nearly unlimited options to construct computer-based menus that are comprehensive, flexible, and modifiable. You can define as many different menus as necessary for different sections of the establishment, different times of the day, different days of the week, or for special events. You can also assign a different screen to each job code, and have them active at the same time. The Aloha POS system supports up to 999 different menus; a number well beyond what most restaurants find necessary.

This section discusses the menu building process, in detail, and establishes such things as the components of the menu system, the interdependencies between the components, and the recommended method for building a menu system. Before building the menus, you must first understand the available pricing methods and the hierarchy used to determine the price in effect for the item when it is ordered.

Select Maintenance > Menu to access the menu setup, taxing, and pricing options, as shown in Figure 5-1:

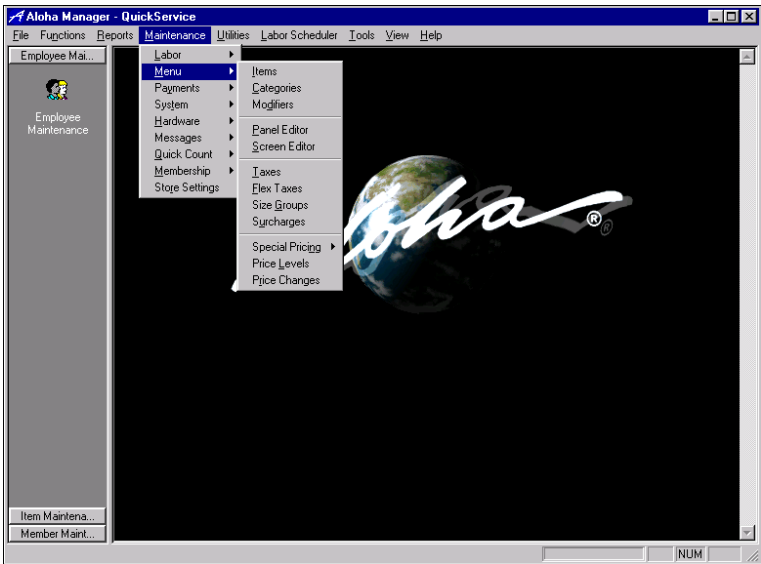


Figure 5-1 Maintenance Menu

In this chapter you learn how to:

- Determine the price of an item using the available pricing methods and their hierarchy.
- Create required items, including menu items, and modifiers.
- Create categories and add items to them.
- Create modifier groups and attach them to items.
- Create taxes and attach them to items.
- Create size groups.
- Create the FOH user interface using Panel Editor and Screen Editor. This includes creating panels for use with menus, order modes, tenders, and other button functions.

Pricing Methods and Pricing Hierarchy

There are a variety of pricing methods available in the Aloha system. Using the different pricing methods, you can control the price of an item no matter the circumstances under which it is ordered. For example, the price of an item when it is ordered as a menu item might be \$2.00, but when it is ordered as a modifier to an entree, there is no charge associated with it.

The available pricing methods are Item Level Pricing, Price Level Pricing, Price Change Pricing, Button Pricing, and Quantity Item Pricing, in that order from lowest to highest. Quantity Item Pricing override all other pricing methods, even when using a scanner, or the PLU function.

Item Level Pricing

Item Level Pricing assigns the price to the item record in Maintenance > Menu > Items and is the lowest level of the pricing hierarchy. All other pricing methods overrides 'Item Pricing'.

Price Level Pricing

Price Level Pricing assigns a price to a group of items that carry the same price. For example, if all medium drinks are \$1.15, create a \$1.15 price level and attach it to all medium drinks. You can change the price of all medium drinks by changing the price of the price level. You create the price level in Maintenance > Menu > Price Levels, and then assign the price level to the item in Maintenance > Menu > Items.

Price Change Pricing

Price Change Pricing temporarily changes the price for items, price levels, or promotions, for a specified time frame. For example, you may want to offer \$1.00 off on all desserts ordered an hour before closing. You create the price change in Maintenance > Menu > Price Changes, and then activate a 'Set Price Change' event in Maintenance > System > Events. Price Change Pricing is either 'item price changes' from items defined in Maintenance > Menu >

Items, 'price level price changes' from price levels defined in Maintenance > Menu > Price Levels, or 'promotion price changes' from promotions defined in Maintenance > Payments > Promotions.

Button Pricing

Button Pricing assigns a price to items using modifiers. You can assign a different price to an item at the button level or use the 'Item Pricing' and 'Price Level' methods. To set up a button price, select Maintenance > Menu > Modifiers, and double-click the modifier you want to price. A dialog box similar to the one shown in Figure 5-2 displays, as shown in Figure 5-2:

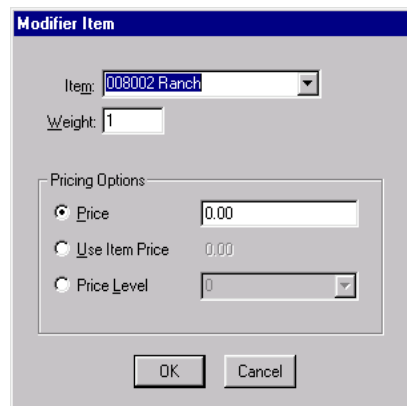


Figure 5-2 Button Pricing Example

Choose ONE of the following methods for the item:

- Select 'Price' and type a price for the item. This overrides all 'Item Pricing', 'Price Changes', and 'Price Levels' methods.
- Select 'Use Item Price' to use the 'Item Pricing' method for the item, as defined in Item Maintenance, however, the price is subject to the same hierarchy between the 'Item Pricing', 'Price Level Pricing', and 'Price Change Pricing' methods. If you have a 'Price Level' assigned to the item in Item Maintenance, then the 'Price Level' is used. If you

have a ‘Set Price Change’ event, then the event overrides the ‘Price Changes’ and ‘Item Pricing’ methods.



Scanners and the PLU function do not recognize button prices. If scanners or the PLU function are in use, do not use the button level pricing method.

Quantity Item Pricing

Quantity Item Pricing associates an item to be sold in bulk or by the usage, such as ounces, liters, and pounds. When you order an item with ‘Quantity Item Pricing’, an additional screen appears for entering the amount so the system can calculate the price. You create a quantity item price in Maintenance > Menu > Special Pricing > Quantity Pricing from items defined in Maintenance > Menu > Items. This method takes precedence over any other pricing method.

Order Entry Screen (User Interface)

The Aloha QuickService FOH order entry screen is composed of the home screen that displays when you log in to the FOH, and secondary screens, if required. The home screen is defined in Screen Editor and is made up of designated panels that are created in Panel Editor.



The job code in which the employee is assigned determines the order entry screen that displays when the user logs in. Select the screen from the 'Order Entry Screen' drop-down list.

Panels are groups of buttons that form a logical group of similar items, such as 'Burgers', 'Drinks', 'Sides', etc. They are constructed from elements contained in the Item file. This file contains the individual menu items sold by the restaurant, as well as many of the component parts, which are called modifiers.

Modifiers, which are assigned to items, are made up of items that modify other menu items in the same way that lettuce modifies hamburgers. For example, if Hamburger (menu item) is entered in the Item file, then an item for lettuce, onions, and pickles (ingredient modifiers for a hamburger) and meat temperatures, such as Rare, Medium, and Well Done (preparation modifiers) must also be created in the Item file.

Buttons are the basic building blocks of the user interface. Buttons are placed on panels and either contain items or perform other functions. The button's size, shape, color, text, and position are user-definable, as well as the button's behavior. For example, a button can be used to 'chain' to another panel (secondary screen) that also consists of buttons that either contain items or perform other functions. A panel's shape, color, screen position, and title are also user definable, thus creating a customized user interface to meet the exact needs of your establishment. Used in conjunction with your imagination, the freeform nature of the menu system provides unlimited power when configuring the user interface.

We recommend you sketch a design of the order entry screen you want to emulate before attempting to create the necessary panels and screens for your user interface. A forgotten panel or feature could result in major alterations.

The Home Screen

The home screen is the main screen you see when you log in to a FOH terminal. Home screens are defined in Maintenance > Menu > Screen Editor and are considered the default screen when attaching order entry screens to job codes and terminals. Figure 5-3 shows a possible layout for a home screen. Your screen could be very different, depending on your needs:

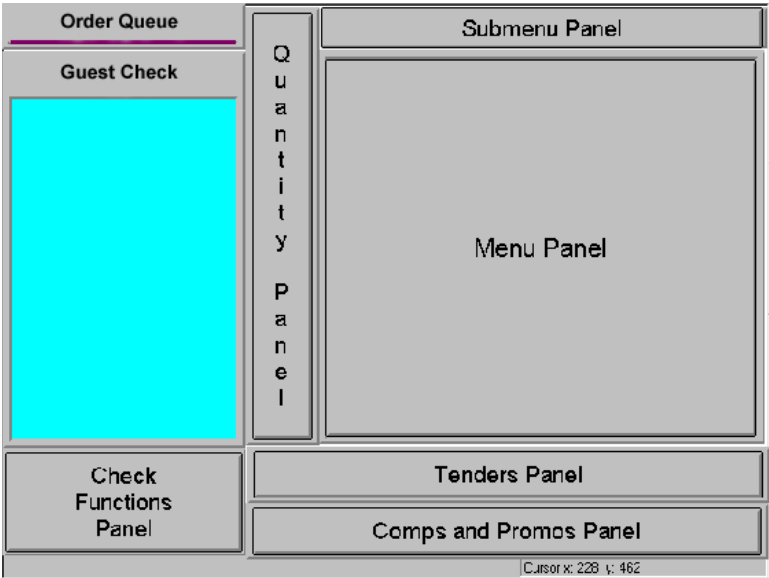


Figure 5-3 Home Screen Example



The Aloha system does not refer to these panels as a home screen.

For a more efficient design, the home screen should be a collection of separate panels, instead of one central panel for button consolidation. The fewer the panels, the less flexible the FOH operates. What makes up the home screen affects vital elements of the food industry, such as speed of service, item accessibility, and operational needs and procedures. The home screen should meet the needs of the specific environment.

Secondary Panels

Secondary Panels are panels that are not displayed on the home screen, yet they can be accessed from the home screen or another secondary panel. Secondary panels as shown in Figure 5-4: range from panels of tenders, functions, items, to user-prompt messages.

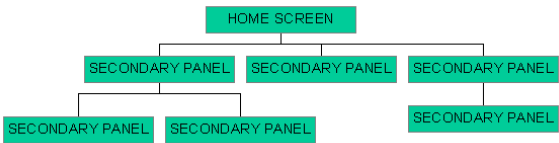


Figure 5-4 Secondary Panels Relationship



The Aloha system does not refer to these panels as secondary panels.

Secondary panels must never partially overlap another panel. Each secondary panel must cover edge to edge, or the FOH does not display the overlapped panel. In Figure 5-5, the Burgers panel will not display on the FOH because it is partially overlapped by the Salads panel. Secondary panels can overlap any number of separate panels, as long as they are aligned to the edge of the panel

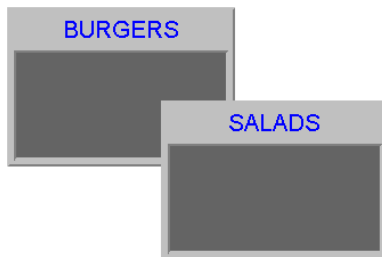


Figure 5-5 Overlapping Panels



Secondary panels must always have a button enabling you to return to the home screen. This is accomplished with a chaining function button, either through a single button touch or within a script configuration.

Panel Examples

Panels are created and maintained in Maintenance > Panel Editor. User-defined panels should contain groupings of related functions or menu items to provide maximum flexibility in a logical convention. The ideal home screen should contain any of the following recommended panels:

Quantity Panel

Provides the ability to order multiples of an item with the press of a single button. It should contain numbers 0-9, and with the 'Append to current quantity' check box selected on each button, the function is enhanced with the ability to select double-digit entries. For example, to ring up 12 burgers, touch 1 and 2. The Quantity panel (Figure 5-6) is usually created as a vertical or horizontal bar and is placed on the home screen.



Figure 5-6 Quantity Panel Example

Submenu Panel

Provides access to different menu groupings, such as Beverages, Sandwiches, Grill Station, etc. Submenu panel buttons have chaining functions, and follow either a strict color scheme or can be decorated with colorful graphics or bit-maps provided by the Aloha POS system. Without this necessary tool, a large database is difficult to operate. The submenu panel (Figure 5-7), is usually created as a vertical or horizontal bar and is placed on the home screen.



Figure 5-7 Submenu Panel Example

Check Functions Panel

Contains a group of button functions, such as repeat, delete, exit, etc., that take action on the current check. The buttons on this panel vary. Each job code may have a different Check Functions panel. For example, a drive-thru cashier could use the full range of recall functions, or managers could have printer and remote display system rerouting or reporting functions at their fingertips. However, this is not the usual setup. Without this necessary tool, it is difficult to alter current orders and perform certain tasks, subsequently slowing down service. The Check Functions panel (Figure 5-8) is usually created

as a horizontal or rectangular bar near the guest check window and is placed on the home screen



Figure 5-8 Check Functions Panel Example



The buttons placed on the Check Functions panel can determine the speed of service of the establishment.

Menu Panel

Contains the menu items available for ringing sales and is accessed by the chaining buttons on the submenu panel. Like the submenu panel, it follows a strict color scheme and it is the panel most often touched, leading to secondary panels. The menu panel (Figure 5-9) is always created as a square or rectangular shape and is located on the home screen.

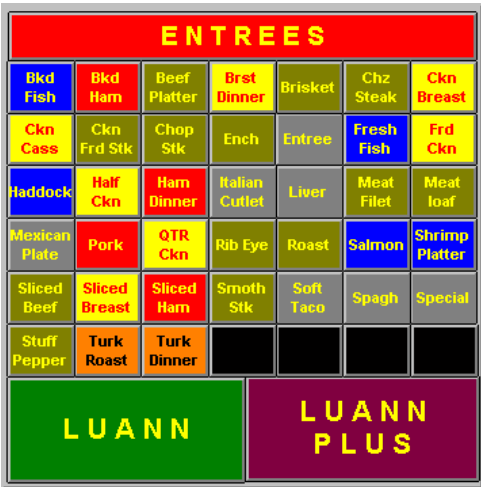


Figure 5-9 Menu Panel Example

Tenders Panel

Contains the available tenders created in Maintenance > Payments > Tenders. This panel is touched on every transaction, so panel location, button size, and accessibility should be taken into consideration. A QuickService environment calls for fast and easy tendering of checks with one screen touch. Tenders should be configured within scripts to close checks and return to the home screen so you are ready for the next order. The tenders panel (Figure 5-10) is created in various shapes, and depending on the allotted space and the environment, this could be on the home screen or used as a secondary panel.



Figure 5-10 Tenders Panel Example

Comps and Promotions Panel

Contains the available comps created in Maintenance > Payments > Comps and Promotions created in Maintenance > Payments > Promotions. Comps and Promos are sometimes combined with the Tenders panel, but depending on the number of comps and promos available, they might warrant their own panel. The Comps and Promotions panel (Figure 5-11) is created as a secondary panel in various shapes, and is usually located off of, or close to, the Ten-

ders panel. Most comps and promos require additional tendering before closing the check.

BOGO Taco	\$.99 Coupon	Free Dessert
Emp Meal	100% Comp	50% Comp

Figure 5-11 Comps and Promotions Panel Example

Employee and Manager Functions Panels

Contains various functions available to the employee, such as Checkout, Break In, Change Password, etc. These panels can consist of button functions that affect current checks, but are usually not related to ringing sales. We recommend creating a separate panel for employee functions and manager functions, based on security and the button functions themselves. Depending on the access levels, the Manager Functions panel could have up to three times as many functions as the Employee Function panel, sometimes having to pass through even more secondary panels to access such things as reports or rerouting. The Employee Functions and Manager Functions panels (Figure 5-12) are normally created as a copy of the square menu panel.





	MGR FUNCTIONS				
Check out	Delete Checkout	Cali brate	Name Order	Recall All	
Clock Out	Delete Clockout	Close Check	Open Drawer	Recall Previous	
Change Password	Clear Password	Edit Time	Print Checkout	Recall Next	
Assign Drawer	Manage Drawers	End Of Day	Refund	Recall Next Open	
Allow Clock In	Clock In/Out	Item Lookup	Close Refund	Reopen Check	
	to MGR REPORTS and ROUTINGS				

Figure 5-12 Employee and Manager Functions Panel Example

Fast Screen Panel

Contains a compilation of the most frequently ordered items, whether they are food, beverage, retail, etc. This shortcut panel is designed for large menus that pass through several secondary screens. In order to function properly, it must be on the home screen and is usually the same size as a menu panel. A smaller version can be created as a horizontal sidebar that remains on the screen. Another common variation is creating a small Beverage sidebar panel (Figure 5-13) to meet situations where a beverage is required on every transaction.



Figure 5-13 Fast Screen Panel Example

Informational Prompt Panel

Prompts the employee to upsell an item or provide dialogue information or instructions to convey to the guest, similar to reading from a cue card. Informational Prompt panels (Figure 5-14) meet most requirements where employees are required to offer the guest a dessert or drink or the item is free.



Figure 5-14 Informational Prompt Panel Example

Modifier Panel

Modifier panels (Figure 5-15) contain all order modifiers which modify menu items for kitchen preparation. If there is a limited amount of modifiers, sometimes they are included on the menu panel itself.

MODIFIERS			
LIGHT	EXTRA	NO	SIDE
+CHEDDAR	+ ADD DC	MAYO	S*A*M*E
BACON	G/O	MUST	T/S
+BBQ SC	H/M	MUST	TOMATO
CHEESE	KETCHUP	ONIONS	
CHILI	LETTUCE	PLAIN	
Open Food		BACK	

Figure 5-15 Modifier Panel Example

There are several variations and methods of using modifiers:

System Modifier Screen — Use the system modifier screen which is invoked by the Modify button function. Refer to the Modify button function in the Button Functions section in this chapter.

Modify Panel Screens — Use the system generated screens created by the Modify Panel feature. Select the 'Screen Flow Required' and 'Use Modify Panel' check boxes and select a panel from the 'Panel' drop-down list in Maintenance > Menu > Modifiers. The selected panel is a blank panel created in Maintenance > Menu > Panel Editor. The Modifier Panel feature creates FOH screens with the modifiers attached to a corresponding item. The screens are sized according to the number of modifiers and each has an OK and Cancel button, and an optional keypad for ordering in quantities. If buttons are placed on the blank panel, they are combined with the items in the modifier group. Refer to the Modifiers section later in this chapter.

User Defined Modifier Panels — Use modifier panels creating in Maintenance > Menu > Panel Editor, as shown in the example. The Modifier panel is displayed either by touching a corresponding chaining button, or the panel is forced through a script configuration. This method usually must have another chaining button, enabling you to return to the menu item panel, as explained earlier in the Secondary Panels section.

Menu Building Methods

There are several methods you can use to build the menu system. The recommended method is to build menus from the bottom up, beginning with tax methods, then building the menu items and modifiers. Attach the items to buttons on a panel, and then assign the panels to screen(s) using Screen Editor. Or you can reverse the process and build the menus from the top down.

Regardless of the method you choose to build the menus, the interdependencies of database files must be remembered. Some files must be revisited in order to complete the records, such as to add a modifier group to an item. However, building menus from the bottom up reduces the amount of revisiting required.

The diagram shown in Figure 5-16 represents building a menu system from the bottom up and reflects the interdependencies between the database files:

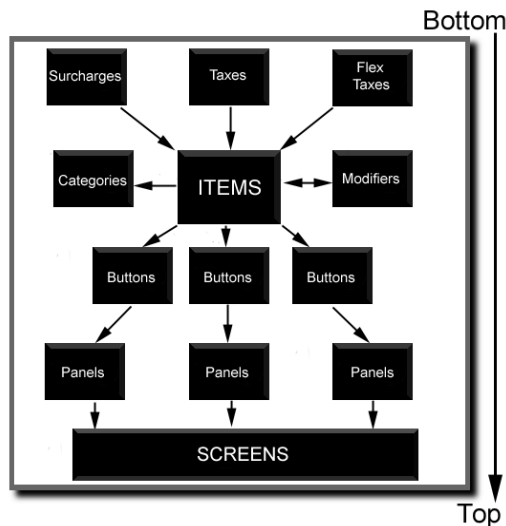


Figure 5-16 Bottom to Top Menu Building Method

To build a menu from the bottom up:

1. Select Menu > Taxes and define all required tax methods. Tax records are complete, and are not interdependent on other database files. Every item must be assigned a tax method. For items that are not taxed, create a 'No Tax' tax record and assign this tax to the item. (Refer to Taxes in this chapter for details on creating taxes.)
2. Select Menu > Flex Taxes and define all flex taxes, if applicable. Flex Tax records are complete, and are not interdependent on other database files. (Refer to Flex Taxes in this chapter for details on creating flex taxes.)
3. Select Menu > Surcharges and define all surcharges, if applicable. The Surcharge records are complete, and are not interdependent on other database files. (Refer to Surcharges in this chapter for details on creating surcharges.)

4. Select Menu > Items and enter all menu items, as well as items that are used to modify the newly entered items. Assign the correct tax method when entering each menu item. (Refer to Items in this chapter for details on creating items.)
5. Select Menu > Categories and define all categories. Place the appropriate items in them. Each item must be in either a sales or retail category. Items can be placed in an unlimited number of non-sales categories. (Refer to Categories in this chapter for details on creating categories.)
6. Select Menu > Modifiers and create the required modifier groups. (Refer to Modifiers in this chapter for details on creating modifiers.)
7. Select Menu > Items again, and attach the appropriate modifier groups to the corresponding items.
8. Select Menu > Panel Editor and define all necessary panels. Place the required buttons on them. (Refer to Panel Editor in this chapter for details on creating panels and buttons.)
9. Select Menu > Screen Editor and define all necessary home screens. Place the desired panels on them. (Refer to Screen Editor in this chapter for details on creating home screens.)
10. Select Labor > Job Codes and attach the necessary home screen to the corresponding job code. Refer to Chapter 4 - Labor Maintenance Functions for details on creating job codes.)

Items

Menu items are the building blocks that form the base of the Aloha menu system. Every item available from a restaurant must be included in the Items file before it can be used by the system. These items can be menu items themselves, the components of those items, the temperature for meat, or anything that would be written on a guest check or chit. The maximum number of items that can be added is 100,000, however a limit is enforced in the Maintenance > Store Settings > System group. Increasing the number of menu items to 30,000 uses more memory and should be used only when necessary.

Once items are created, they can be grouped together to form modifier groups. The Items file, however, also requires data from other files in the menu system, including Maintenance > Menu > Taxes, Maintenance > Menu > Surcharges, Maintenance > Menu > Modifiers, and Maintenance > Menu > Categories in order to complete a record.

Select Maintenance > Menu > Items to display the Items function tab, as shown in Figure 5-17:

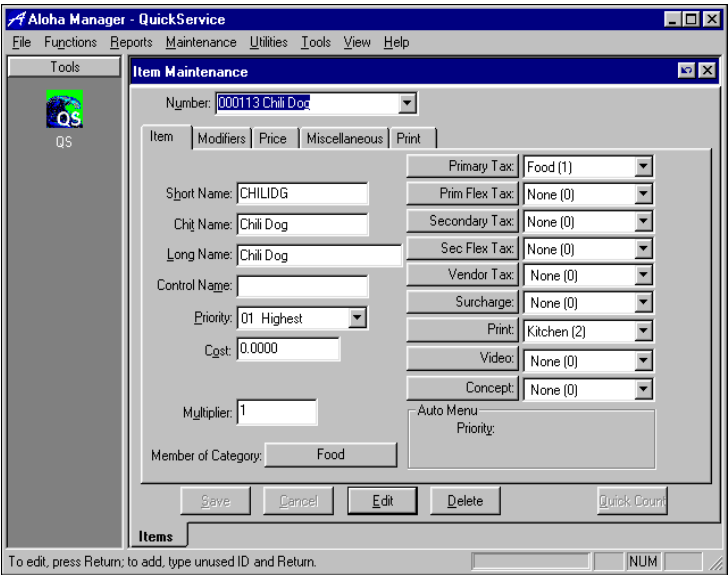


Figure 5-17 Item Function Tab

Number — Holds a six-digit number that together with 'Long Name' uniquely identifies each record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Number drop-down list, select the record to edit and press Enter.

The Items function tab contains the following subtabs, which are used to define modifiers and price levels: Items, Modifiers, Price, Miscellaneous, and Print, with Item used as the default subtab.

Item Subtab

The Item subtab defines the name of the item that displays on the FOH and in the reports for the BOH. Taxes are also defined for the item on this subtab.

Short Name — Holds a short name for the item that is placed on item buttons in submenus, modifier groups, or exception modifier groups. The data entered here is centered on the button; therefore, length is an issue. This can be up to 15 positions, but usually anything over 11 can cause it to be truncated on both ends making it too cryptic for servers to understand. A two-line button is created by entering '\n' at the desired line break in the 'Short Name' text box. For example, 'Hot\nTamale'. The '\n' takes up two of the 15 characters.



Capital letters used in the name text boxes take up more space than lowercase letters.

Chit Name — Holds the name of the menu item that prints on the kitchen chit. A chit is a printed stub the kitchen receives once an order is sent to the kitchen. The kitchen chit may contain menu items as well as modifiers depending upon how the order is entered in the system.

Long Name — Holds a description of the item that is printed on guest checks. This is also used in conjunction with the item Number to create a unique ID for the item.

Control Name — Used by restaurant chains to provide naming consistency across all locations. It is a control feature commonly used in situations where geographical or language differences mandate that an item have a different 'Short Name' at different locations, yet it is viewed as the same item by the main office.

Priority — Determines the order in which the item displays on the chit. The settings range from 01 to 99, with 01 the highest and 99 the lowest. An item with a high priority prints ahead of an item with a lower priority.

Cost — Specifies the dollar amount required to produce the item. This is optional and should not be confused with an item's price.

Multiplier — Specifies the quantity sold for the product, with 1 being the default. For example, an item 6 Donuts would have a multiplier of 6. This works in conjunction with the PMIX report in Reports > PMIX.

Primary Tax Button

Click Primary Tax to access the Taxes function tab and create a new primary tax, if necessary. Changing a tax changes the tax on all items assigned to that tax.

Primary Tax — Designates the tax record to apply to the item.

Primary Flex Tax Button

Click Primary Flex Tax to access the Flex Taxes function tab and create a new flex tax, if necessary. Changing a flex tax, changes the flex tax on all items assigned to that tax.

Flex Tax — Designates the primary flex tax to apply to the item, if applicable.

Secondary Tax Button

Click Secondary Tax to access the Taxes function tab and create a new tax, if necessary. Changing a tax changes the tax on all items assigned to that tax.

Secondary Tax — Designates the secondary tax to apply to the item, if applicable. Only tax records with 'Secondary' selected display in the drop-down list.

Sec Flex Tax Button

Click Sec Flex Tax to access the Flex Taxes function tab and create a new flex tax, if necessary. Changing a flex tax, changes the flex tax on all items assigned to that tax.

Sec Flex Tax — Designates the secondary flex tax to apply to the item, if applicable.

Vendor Tax Button

Click Vendor Tax to access the Taxes function tab and create a new vendor tax, if necessary. Changing a tax changes the tax on all items assigned to that tax.

Vendor Tax — Designates the vendor tax to apply to the item, if applicable. Only tax records with 'Vendor' selected display in the drop-down list.

Surcharge Button

Click Surcharge to access the Surcharges function tab and create a new surcharge, if necessary. Changing a surcharge changes the surcharge on all items assigned to that surcharge.

Surcharge — Designates the surcharge tax to apply to the item, if applicable.

Print Button

Click Print to access the Printer Groups function tab and create a new printer group, if necessary. Changing a printer group changes the printer group on all items assigned to it.

Print — Designates the printer group to which the item should print.

Video Button

Click Video to access the Video Groups function tab and create a new video group, if necessary. Changing a video group changes the video group on all items assigned to it.



Refer to the
Interfacing
RDS with Aloha User's
Guide for more informa-
tion regarding the setup
requirements for video.

Video — Designates the video group in which the item should display, if applicable. The drop-down list displays the short name description of the selected video group.

Concept Button

Click Concept to access the Concept function tab and create a new concept, if necessary. Changing a concept changes the concept on all items assigned to it.

Concept — Designates the concept to which the item is associated, if applicable.

Member of Category: No Category Button

Click Member of Category to access the Categories function tab and create new categories, if necessary, including adding new categories and changing the category to which an item is assigned. Changing a category to an item, affects all comps, promos, and reports assigned to the item.



The Member of Category button displays the name of the sales or retail category in which the selected item is assigned. For example, if an item in the Food category is selected, the button displays the word FOOD. All items are assigned to either a sales or retail category.

Auto Menu Inset

Not available in QuickService.

Modifiers Subtab

The Modifiers subtab establishes the modifier groups to attach to the item as well as rules to apply to the item when it is used as a modifier. Select the Mod-

ifiers subtab (Figure 5-18), from the Items function tab to set specific settings for modifiers:

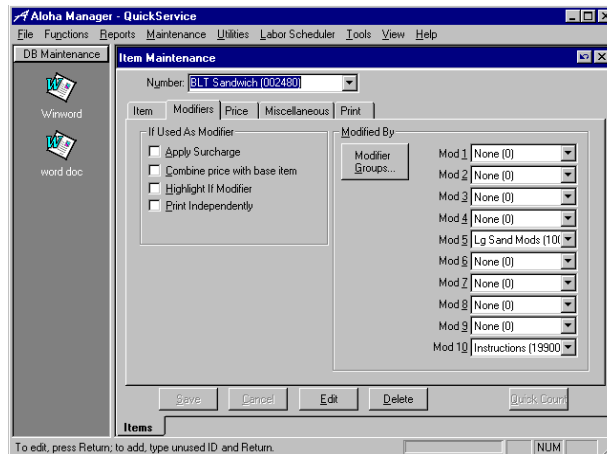


Figure 5-18 Modifiers Subtab

If Used as Modifier Inset

Apply Surcharge — Applies a surcharge to the item when it is used as a modifier.

Combine Price with Base Item — Combines the price of the item when it is used as a modifier with the modified item's price. Otherwise the price is listed separately.

Highlight if Modifier — When the item is used as a modifier, it prints the item in reverse type on the chit — white on black on monochrome printers, and in red on color printers.



The 'Red Items' check box in the Chit Print subtab located in Maintenance > Store Settings > Printing group, must be selected to activate the 'Highlight if Modifier' feature on color printers.

Print Independently — Prints the modifier on the chit in the same format as a regular item.

Modified By Inset

Modifier Groups Button

Click Modifier Groups to access the Modifiers function tab and create a new modifier group, if necessary. Changing a modifier group changes the modifier group for all items to which it is assigned.

Mod 1 through Mod 10 — Designates the modifier groups that should be attached to the item. Up to 10 modifier groups can be assigned to each item. Before modifiers can be assigned to an item, however, they must first be defined in Maintenance > Menu > Modifiers.

Price Subtab

The Price subtab defines the price for the item. Select the Price subtab from the Item function tab to edit or assign a price to an item, as shown in Figure 5-19:

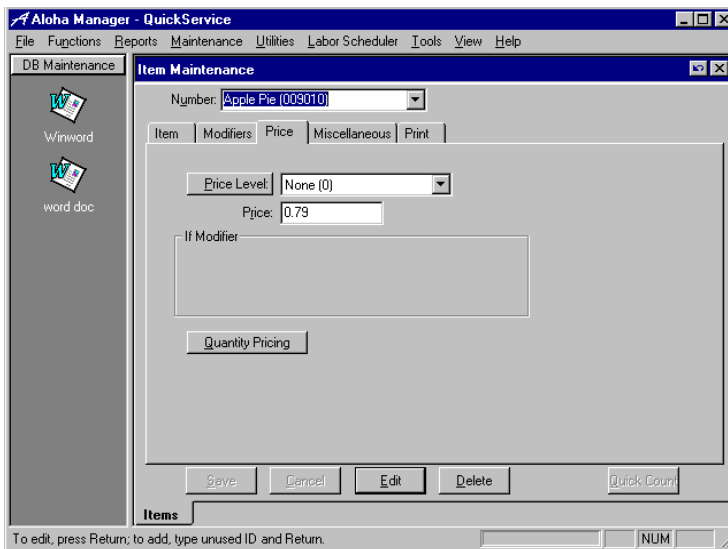


Figure 5-19 Price Subtab



Refer to the Pricing Methods and Pricing Hierarchy section at the beginning of this chapter for more information about pricing.

Price Level Button

Click Price Level to access the Price Levels function tab and create a new price level, if necessary. Changing a price level changes the price level for all items assigned to it.

Price Level — Designates the Price Level to use for the item. Price Levels enable a common price to be assigned to items in a group.

Price — Specifies the price assigned to the individual item. This price is the lowest level in the Pricing Hierarchy.

Quantity Pricing Button

Click Quantity Pricing to access the Quantity Pricing function tab and create a quantity priced item.

Miscellaneous Subtab

The Miscellaneous subtab defines alternate SKU numbers for the same item, set video attributes, define open items, define gift cards, and more. Many set-

tings display only if other features are activated. Select the Miscellaneous subtab, as shown in Figure 5-20, from the Items function tab:

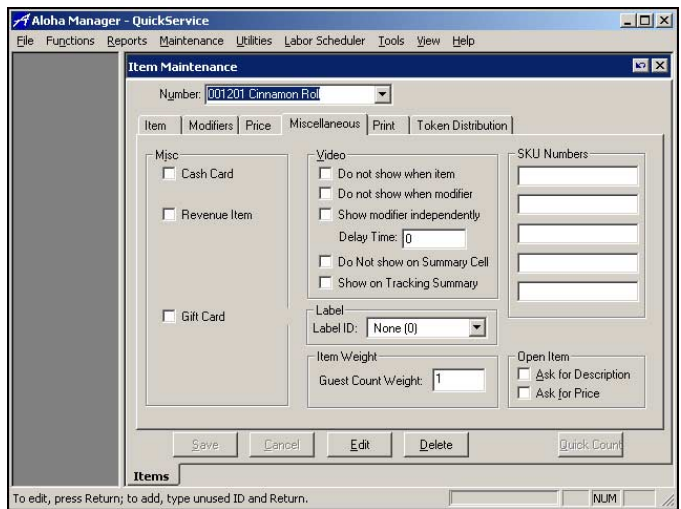


Figure 5-20 Miscellaneous Subtab

Misc Inset

Cash Card — Designates this item is used to sell a cash card in the FOH.

Gift Certificate — Designates this item is used to sell a gift certificate in the FOH. This check box is only available if Gift Certificate Manager is in use.

Revenue Item — Specifies the item is not included in net and gross sales. For example, select this check box for such things as party deposits, amusement or slot machines, admissions, club dues, and more.

Gift Card — Specifies the item is set up as a gift card. This check box is only available if gift cards are in use, and enables the ‘Activate Card’ and ‘Add Value’ settings.

Activate Card — Activates the gift card upon approval.

Add Value — Activates the gift card upon approval with the ability to add value to the card.



Refer to the Aloha Accessories User’s Guide for more information regarding setup requirements for cash cards.



Refer to the Aloha QuickService Special Features Guide for more information on gift cards.

Video Inset

Do Not Show when Item — Prevents an item from displaying on the video screens when the item is ordered as an item.

Do Not Show when Modifier — Prevents an item from displaying on the video screens when the item is ordered as a modifier.

Show modifier independently — Displays the modifier on the video screen in the same format as a menu item even though the item is ordered as a modifier.

Delay Time — Specifies the amount of time, in seconds, that an item takes to prepare. The delay time is an indicator for the food preparer to have items ready at a specific time. This is used when one item takes longer to prepare than another.



Orders containing items with delay times are indicated on the video monitor with inverted headings.

A delay time is specified for the item that takes the longest to prepare. This time displays on the video monitors to which any other items on the order are sent. When the item with a specified delay time is bumped, a countdown is initiated on the other video monitors. A delayed order cannot be bumped until the countdown for the item with the delayed time begins. If more than one item on the order has a delay time specified, the longest delay time is used. For example, a pizza takes 10 minutes to cook. A salad takes one minute to prepare. Set the pizza to have a delay time of 10 minutes (600 seconds). When the pizza is bumped, indicating start of preparation, the delay time of the pizza item is indicated on the video monitor where the salad displays. The delay time counts down to zero. The delay time indicates the time the pizza will be ready and enables the food preparer to prepare the salad and have it ready at the same time the pizza is ready.

Label Inset

Label ID — If the item requires a printed label when it is ordered, select the corresponding Label ID from the drop-down list. Labels are defined in Maintenance > Hardware > Labels.

Item Weight Inset

Guest Count Weight — Establishes the weight value of the item when counting guests by category. For example, you can set the guest count weight of an item named 'Fajitas for Two' so that it increases the guest count by two when a customer orders it. This check box works in conjunction with the 'Use Entrees for Guest Counts' check box and the 'Category' selected in Maintenance > Store Settings > Order Entry group on the Guest Counts subtab. The default guest count weight is one.

SKU Numbers Inset

The SKU text boxes store the item's SKU number(s). Additional entries allow you to assign more than one SKU number to an item.

Open Item Inset

Ask for Description — Forces the FOH to prompt for a description when the item is sold.

Ask for Price — Forces the FOH to prompt for the price when the item is sold. When an open item requires a description and a price, the FOH prompts for the description first. After it is entered, a prompt for the price displays.

Quick Count Button

Click Quick Count, located at the bottom of the Items function tab, to access the Quick Count Tracking Items function. This function is available only if using the Quick Count.



Refer to the Aloha Quick Count User's Guide for more information on using Quick Count.

Print Subtab

The Print subtab defines printing aspects of an item, such as check and chit printing, and item justification. Select the Print subtab, shown in Figure 5-21, from the Items function tab:

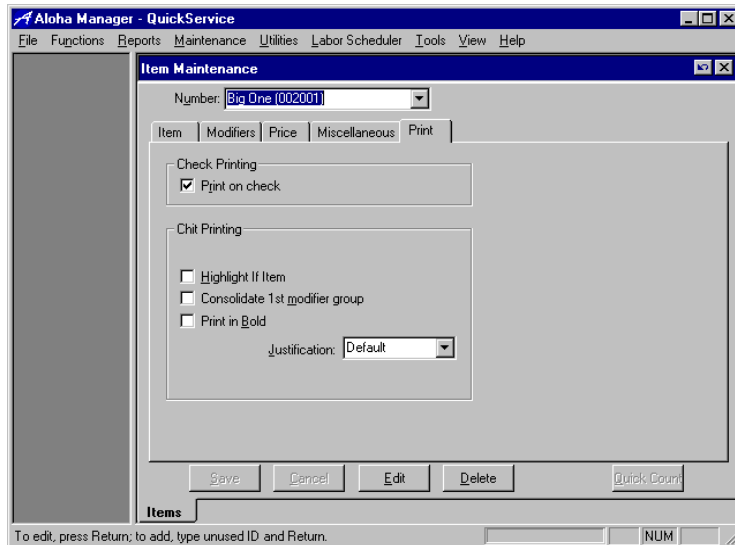


Figure 5-21 Print Subtab

Check Printing Inset

Print on Check — Prints the item on the guest check when it is used as a modifier; otherwise, it prints only on the chit.

Chit Printing Inset

Highlight if Item — Prints an item in reverse type on the chit — white on black on monochrome printers, and in red on color printers — when the item is used as a modifier.



The 'Red Items' check box in the Chit Print subtab located in Maintenance > Store Settings > Printing group must be selected to activate the 'Highlight if Modifier' feature on color printers.

Consolidate 1st Modifier Group — Prints and consolidates modifiers based on the first modifier group of the item. Use this setting in conjunction with ‘Consolidate Items with Different Modifiers’ in Maintenance > Store Settings > Printing > Chit Appearance. This is for food items, such as steaks, which commonly have prep temperature as the first modifier group. The kitchen can then know how many steaks to prepare based on preparation time.

- 3 Ribeyes
 - 2 MR
 - 1 Soup
 - 1 Salad
 - 1 MW
 - Soup

Print in Bold — Prints the item in bold on the chit.

Justification — Specifies the printing justification on the guest check for the item. Available options are left, centered, and right, with left being the default.

Categories

The Categories feature of the Aloha menu system combines like menu items into groups that can be tracked for reporting purposes, to promote special items on the menu, or to modify other parts of the menu system. Categories are used extensively with Promotions, Comps, Order Modes, Labor Groups, and Performance Measures. A maximum of 950 categories can be defined. Up to 40 of these can be used for sales and 910 can be used for non-sales categories.



A category cannot be deleted if it is assigned to a promotion, comp, order mode, or a performance measure.

Category Rules

Categories can be as simple or as complex as required, but there are several rules governing the creation of new categories:

- Include every item in either a sales or a retail category.
- Items cannot be in more than one sales or retail category.
- Non-sales categories are useful, if used properly, but not required.
- An item may be in one sales, or one retail category, and none, one or more non-sales or suggestive categories.
- Items not placed in a sales or retail category are automatically assigned to the first sequential sales or retail category.

New categories can be as general or as specific as desired. In the simplest form, sales categories could be created for Non-Alcoholic Beverages, Food, Liquor, Wine, Beer, and Other. In a more detailed form, sales categories could be created for Non-Alcoholic Beverages, Alcoholic Beverages, Coffee/Tea, Appetizers, Soups/Salads, Burgers, Sandwiches, Sides, and Desserts. The more specific the sales category, the more detailed the reporting.

Select Maintenance > Menu > Categories to display the Categories function tab, as shown in Figure 5-22:

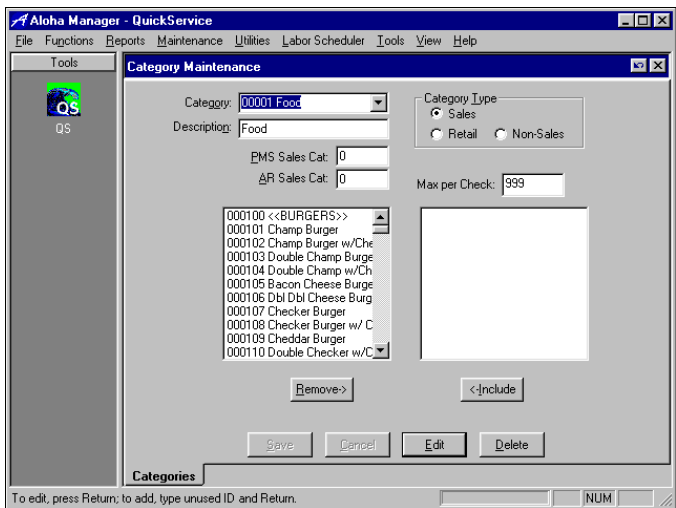


Figure 5-22 Categories Function Tab

Category — Holds a four-digit number that together with 'Description' uniquely identifies each category record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Category drop-down list, select the record to edit and press Enter.

Description — Enter a descriptive name to identify the category.

PMS Sales Cat — Used when a hotel property management system (PMS) is used in conjunction with the Aloha POS system. The PMS Interface enables the Aloha POS system to communicate with the hotel's property management system. When this is the case, enter a category number (usually 1-4) that corresponds to the four Aloha categories in the PMS system. PMS categories are usually set up on a hotel's property management system as follows: 1-Food, 2-Liquor, 3-Beer, and 4-Wine.



Refer to Chapter
4, Labor Maintenance Functions, for more
information on Access Levels.

AR Sales Cat — Defines the Account Receivable (AR) sales category field in the Aloha Back Office Accounts Receivable product to which the current category reports.

Max Per Check — Limits the number of times you can add an item from this category to the check. Enter a number from 0 up to 999. If set to 999, there is no limit. When you exceed the defined amount of the same item on the check, the system checks if the employee has a sufficient access level to add more of the same item. If the employee does not have sufficient access, the Manager Approval screen appears. If the manager has sufficient access, they can enter their employee number in the Manager Approval screen to approve the addition of the item.



To approve the items over the limit, a manager must have ‘Override Category Limits’ selected in their access level.

If an item is in more than one category, the most restrictive category determines the number of times you can add the item to the check. For example, if you place Bud in a category that allows two items per check, and in another category that allows five items per check, the system enforces the limit of two items per check.

Category Type Inset

Sales — Groups related food and beverage items together for tracking and sales analysis. The results are available immediately through manager function keys on order entry terminals. A maximum of 40 sales categories can be created.

Retail — Groups related retail items, such as caps and shirts together for tracking and sales analysis. These are separated and tracked differently from food and beverage items. The results are available immediately through manager function keys on order entry terminals.

Non-Sales — Used primarily by other features, such as Order Mode, Promotions, Comps, or Performance Measures, as a qualifying parameter.

Category Selection Lists

The two selection lists in the dialog box are used to define categories. The list on the left side of the screen contains those items that are presently assigned to the selected category. The list on the right side of the screen contains the items in the Items file.

To add an item to a category:

1. Select the desired **item** or **items**, in the list on the right. You can also double-click an item to move it to the opposing list box. To add more than one item at a time, hold down Ctrl and use the mouse to select multiple items in the list on the left.
2. Click **Include**. The item is copied to the list on the left indicating it is included in the category.

To remove an item or items from a category:

1. Select the desired **item** or **items** in the list on the left. You can also double-click an item to move it to the opposing list box. To add more than one item at a time, hold down Ctrl and use the mouse to select multiple items in the list on the right.
2. Click **Remove**. The item is copied to the list on the right indicating it is removed from the category.

Modifiers

Modifiers are groups of items used to extend, alter, or further define menu items. Modifier groups have a circular relationship to items in that they are composed of items defined in the Items file, grouped into a modifier group, and then assigned to an item. Modifiers convey information to the kitchen when printers and remote display systems are in use. For example, lettuce, onions, and pickles are added to the Items file, collected into a modifier group called 'Extras', then assigned to the 'Hamburger' item.

When the 'Hamburger' item is added to a submenu, and a server selects it on an order entry terminal, a modifier can be selected from the 'Extras' modifier group. Using the features available in the Modifier Group function, you can control whether the modifier group displays automatically when the item in which it is attached is selected, or if the Modify button must be selected to display the modifier group. You can also control other attributes such as the minimum and maximum number of modifiers that are selected and the number of free modifiers. This linked method of building menus permits unlimited configuration options in the menu system.



Modifiers force cashiers to pass through extra screens and slow down a cashier. For example, in a cafeteria setting the cashier does not need to modify an item with extra tomatoes unless there is a charge for extra tomatoes.

The items included in the modifier group must first be created in the Items database. They can then be quickly and easily added to a modifier group.

There are four common types of modifiers:

- **Ingredient** — An ingredient or topping that can be added or omitted per a customer's request. For example, onions on a hamburger, or sour cream on nachos. These groups are hardly ever forced unless encouraged and stated on the menu.
- **Side** — A side that a customer has to choose to complete an entree or a combo. For example, french fries, salad, or vegetables are side modifiers. These groups are usually forced with a Min 1, Max 1.

- **Preparation** — A way in which an item is prepared or cooked. For example, a steak temperature. These groups are always forced with a Min 1, Max 1.
- **Quantity/Size** — A size, portion, or an amount. For example, a small, or a cup size for soup. These groups are always forced with a Min 1, Max1.

Select Maintenance > Menu > Modifiers to display the Modifiers function tab, as shown in Figure 5-23:

Modifier Group: Burger Mods (10003)	
Short Name: Burger Mods	Long Name: Burger Mods
Min: 0 Max: 15 Free: 0	
Substitute Group: None (0)	
<input type="checkbox"/> Screen Flow Required	
<input type="checkbox"/> Use Modifier Panel	
<input type="checkbox"/> Show Keypad on Panel	
Modifier Panel: None (0)	

Heavy All 8029 0.30	Mayonnaise 8010	Ketchup 8014
Lettuce 8011	Tomato 8012	Pickle 8013
Onion 8015	Bacon Portion 8007 0.50	Plain 8019
Cheese Portion 8008 0.15	Bacon-3 Slice 8020 0.50	Cheese 8018
No Salt 8025	Mustard 8016	2 Bottom Buns 8028
Grape Jelly 8044	Tartar Sauce 8017	Strawbery Jelly 8045

Figure 5-23 Modifiers Function Tab

Modifier Group — Holds a five-digit number between 10,000 and 19,999 that together with 'Long Name' uniquely identifies each Modifier Group record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Modifier Group drop-down list, select the record to edit and press Enter.

Short Name — Enter a short descriptive name to identify the modifier group. The short name displays on the FOH order entry screen.



The 'Min', 'Max', and 'Free' check boxes use weights on items set up in Maintenance > Menu > Items in the 'Default Weight' check box. Refer to the Items section earlier in this chapter for more information.

Long Name — Enter a longer, more descriptive name to identify the modifier group. Data in the Long Name text box is used in the reporting features built into the Aloha POS system.

Min — Enter the minimum number of modifiers that can be selected when an item is ordered. The value can be 0 (zero). A number greater than zero forces the modifier selection screen to display, regardless if 'Screen Flow Required' is selected. The server must select at least the 'min' number of items from the modifier group. If 'Min' is not set, then 'Max' does not need to be set.

Max — Enter the maximum number of modifiers that can be selected when an item is ordered. If both 'Min' and 'Max' are 0 (zero), an unlimited number is assumed.

Free — Enter the number of items from the modifier group that can be ordered at no charge. For example, if the value for 'Free' is set to 1, then the first modifier item is at no charge.

Substitute Group — Select a previously defined modifier group from the drop-down list that contains items that can be substituted for items listed in this modifier group. It is not necessary to select a substitute group, but if selected, the system places a substitute button on order entry terminals.

Screen Flow Required — Forces the order entry terminal to automatically open the Modifier Group screen. Typically, the value in 'Min' would be greater than 0 (zero), forcing the server to select at least one modifier from the group.

Use Modifier Panel — Forces the order entry terminal screens to automatically open a modifier group screen on the FOH terminal. The screen is generated by the system to display the modifiers created. This feature is used in conjunction with 'Modifier Panel'. Use Modifier Panel requires an order taker to enter the modifiers and enter either an OK or Cancel on the modifier panel. This feature is available when Screen Flow Required is activated.

Show Keypad on Panel — Displays a numeric keypad on the modifier panel. This check box is available when 'Use Modifier Panel' is activated. The numeric keypad enables the user to enter multiple entries of the same modifier.

Modifier Panel — Select a modifier panel from the drop-down list that enables the user to select the modifiers. A panel can be created in Panel Editor for the modifiers. Typically a blank panel is created in Panel Editor and selected for the modifiers to display. This method enables the panel to be used for multiple modifier groups.

Modifier Item Buttons

The Modifiers dialog box contains button positions that are used to add items to the modifier group. Click the arrow button(s) to toggle between the button positions if more items are required for the modifier group.

Modifier items display on order entry terminals in the order in which they are placed on the Modifiers Group Maintenance dialog box, therefore, you should consider the order in which order takers typically select modifiers.

To perform maintenance, such as delete, cut, copy, and paste, right-click the mouse on a button containing a modifier item. To move a modifier, click and drag the button to a new position.

To place a modifier item in the modifier group:

1. Double-click the desired **button position**. The Modifier Item dialog box displays, as shown in Figure 5-24:

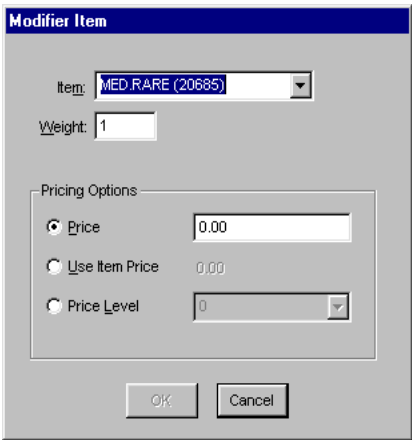


Figure 5-24 Modifier Item Dialog Box



Refer to Chapter 1, Aloha Manager, for detailed instructions about performing maintenance using right-click.



Refer to the Pricing Methods and Pricing Hierarchy section at the beginning of this chapter to determine when pricing entered here is used.

2. Select the **modifier item** to place on the button from the **Item** drop-down list.
3. Enter the selection value to use when determining if the 'Max' number of modifiers have been selected, in the **Weight** text box. For example, if the 'Max' for a vegetable modifier group is set to 3, and a salad with a weight of 2 is selected, only one more vegetable item with a weight of 1 can be selected. The selection value is usually one.
4. Select **one** of the following pricing options:

Price — Designates the button price should be used to price the item. Enter the button price in the text box to the right.

Use Item Price — Designates the price of the item as entered in Item Maintenance is used to price the item.

Price Level — Designates the price established in the assigned price level should be used to price the item. Select the price level from the drop-down list to the right.

5. Click **OK**. The modifier item displays on the modifier button.

To delete a modifier from a group:

1. Right-click the button containing the unwanted modifier.
2. Select **Delete**. The modifier is deleted from the modifier group.

To move a modifier to a different button position:

1. Place the cursor on the button and hold down the left mouse button.
2. Drag the modifier to a different button position and release the left mouse button.

Panel Editor

Use Panel Editor to create or modify the panels that make up the order entry screen (user interface) for Aloha QuickService, as shown in Figure 5-25. Use this graphical tool to define panels, to position panels on the screen and buttons on the panels, and to assign actions and menu items to the buttons. You determine the look and behavior of the order entry screen by the choices you make when creating and placing panels on the screen.

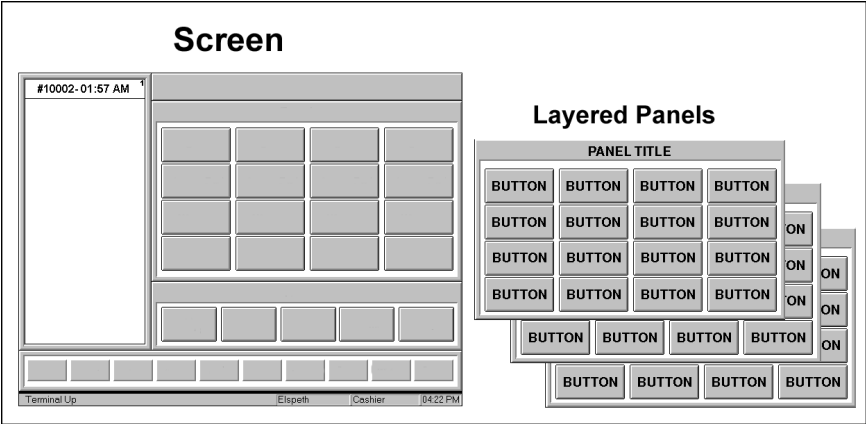


Figure 5-25 Screen Matrix

Panel Editor Tools

Panel Editor provides tools used to ease panel construction and design. Use these tools to design the screens, panels, and buttons to customize the menu for your establishment.

The following tools are explained in detail:

- Desktop Size Settings
- Workspace, Toolbar, and Commands Menu
- Panel Editor Grid
- Coordinates Dialog Box

Desktop Size Settings

The Select Desktop Size dialog box displays each time you access Panel Editor and sets the screen resolution. You should design in Panel Editor using the screen resolution used on the FOH terminals. The resolutions available are determined by the system in use. This is more apparent when large bitmaps may be specific to a resolution. For instance, a hamburger bitmap in 640x480 mode would display as too small for a terminal in 800x600 mode.

You can place bitmaps in the \BMP directory or in subdirectories for each screen resolution within the \BMP directory. The subdirectories for each screen resolution are labeled using an 'x_y' format, where x is the screen width in pixels, and y is the screen height in pixels. For example, you would label the directory for the 640x480 screen resolution as \BMP\640_480, the 800X600 screen resolution as \BMP\800_600, and so on.

Place bitmaps common to all screen resolutions in the \BMP directory and bitmaps for a specific resolution in a separate directory. When you open Panel Editor, you are required to select the screen resolution of the panels for which you are editing, so when you assign a bitmap to a button, screen or panel, the bitmap drop-down list only displays bitmaps in the \BMP directory for the selected screen resolution. For example, if you select a screen resolution of 800x600 when opening Panel Editor, then bitmaps in the \BMP directory and the \BMP\800x600 directory are available in the drop-down list. This is less complicated than trying to select bitmaps from a list of bitmaps for different screen resolutions.

Label bitmaps by their intended screen resolution for easier viewing and configuration. Panel Editor truncates numeric characters at the end of the bitmap file names when you view them from the drop-down lists.

For example, if you have a different version of COKE.BMP for each screen resolution, label them COKE640.BMP, COKE800.BMP, and COKE1024.BMP, and place each file in the corresponding screen resolution's subdirectory. When you view the bitmaps from the drop-down list, you only see COKE. Panel Editor selects the correct COKE.BMP based on the screen resolution you selected when you opened Panel Editor, and properly records the correct file name in the database.

The following are examples of file names and how they display in Panel Editor:

File Name	Display Name
COKE.BMP	COKE
COKE640.BMP	COKE
640COKE.BMP	At least two alphabetic characters are required before the numeric characters.
C640480.BMP	At least two alphabetic characters are required before the numeric characters.
CK640480.BMP	CK
COKE640XXX.BMP	COKE

To set the desktop size:

1. Select **Maintenance > Menu > Panel Editor** to access Panel Editor. The Select Desktop Size dialog box displays to adjust and set the resolution of the screen, as shown in Figure 5-26:

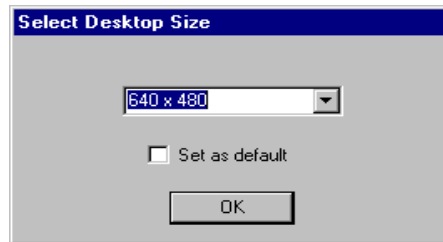


Figure 5-26 Select Desktop Size

2. Select the appropriate **resolution** from the drop-down list.



If you are using a custom resolution for such things as a handheld device, an additional option appears in the drop-down list. To use a custom resolution, set the Alohapexres and Alohapeyres variables to the desired resolution in the Aloha.ini.

3. Select **Set as Default** to set the resolution to be used each time Panel Editor is accessed.
4. Click **OK**.

Workspace, Toolbar, and Commands Menu

After setting the Desktop size, the workspace displays with the toolbar, as shown in Figure 5-27:

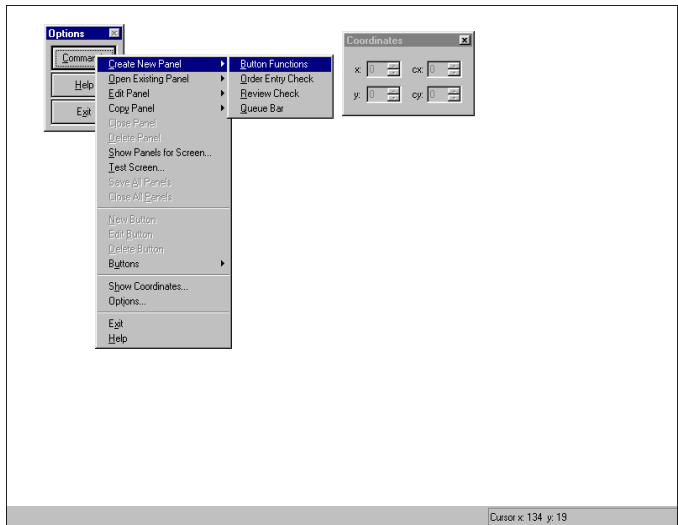


Figure 5-27 Panel Editor Workspace, Toolbar and Commands Menu

The workspace is the white area used to replicate the screen. Use this workspace to design your panels and screens. The toolbar provides access to the Commands menu, the help files, and enables you to exit Panel Editor. Use Coordinates to move and resize panels.



The toolbar and Coordinates dialog box display in the same location as when you last exited Panel Editor. Drag them off to the right to clear the workspace for ease of design.

Click CMDS on the toolbar to display the Commands menu. The menu provides a list of commands, sectioned off by panel and button commands. The Buttons option provides an additional submenu. Create, open, edit, copy, save, and delete panels using the panel commands. Define headings, backgrounds, and text appearance on all panels using panel commands and button commands.



Depending on where it is performed, right-clicking the mouse on either the workspace, panel, or button displays a shortened version of the toolbar and serves as an editing shortcut throughout the Panel Editor process.

To open the commands menu and toolbar:

1. Click **CMDS** on the toolbar. The Commands menu displays.
2. Select an **option** from the menu.

Panel Editor Grid

The Panel Editor workspace uses a grid to align panels and buttons. The Options command enables you to change the default number of pixels to use at a time when you increase or decrease a coordinate in the Coordinates dialog box. We recommend increments of five, such as five or ten pixels. All panels and buttons snap to the grid settings for easy alignment and editing. This feature is an optional setting.

To define and display the Panel Editor grid:

- 1. Select **Options** from the toolbar. The Panel Editor Settings dialog box shown in Figure 5-28 displays:

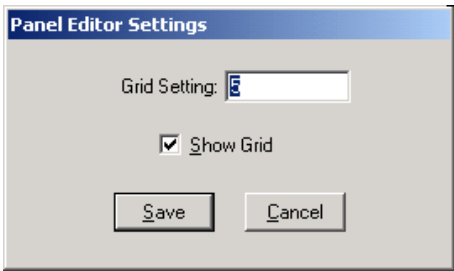


Figure 5-28 Panel Editor Settings Dialog Box

- 2. Enter the **grid spacing** for the Panel Editor workspace, with 1 being the default, in the **Grid Setting** text box. For example, enter 5 to move panels five pixels at a time.
- 3. Select **Show Grid** and click **OK** to display the Panel Editor grid based on the settings in the ‘Grid Setting’ text box, as shown in Figure 5-29, or clear the **check box** and click **OK** to display the workspace without a grid (Figure 5-27)

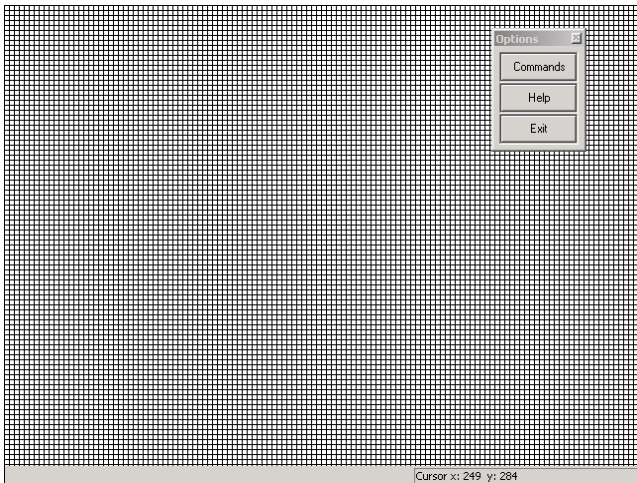


Figure 5-29 Panel Editor Grid

Coordinates Dialog Box

The Show Coordinates command provides a tool to move and size panels with precision based on the grid setting defined in the Panel Editor Settings dialog box.



If you select 'Mark as Template' or 'Fixed Position' in the Panel dialog box, the Show Coordinates command is not available.

The Show Coordinates options, shown in Figure 5-30, displays when you access Panel Editor, or select Show Coordinates from the Commands menu:

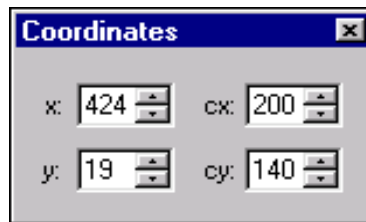


Figure 5-30 Coordinates Dialog Box

To move a panel using the Coordinates tool:

1. Adjust the **x coordinate** using the scroll bar to move the panel to the left or right. Adjust it higher to move left and lower to move right.
2. Adjust the **y coordinate** using the scroll bar to move the panel up or down. Adjust it higher to move up and lower to move down.

To resize a panel using the Coordinates tool:

1. Adjust the **cx coordinate** using the scroll bar to reshape the right side of the panel. The higher the number, the wider the panel becomes.
2. Adjust the **cy coordinate** using the scroll bar, to reshape the bottom side of the panel. The higher the number, the taller the panel becomes.

You can also move and resize panels using the mouse and keyboard. The following procedures depict how to move and resize panels without the Coordinates tool:

To move a panel manually with the mouse:

1. Click the **left mouse button** at the top border of the panel.
2. Hold and drag the **panel** to the desired location.
3. Release the **left mouse button**.

To move a panel manually with the keyboard:

1. Click the **left mouse button** at the top border of the panel.
2. Press the **Up, Down, Left, and Right arrow keys** until the panel is at the desired location.

To resize a panel manually with the mouse:

1. Place the **cursor** on any **side** of the **panel** until a double-sided arrow displays.
2. Click the **left mouse button**.
3. Hold and drag the **panel border** until the panel is at the desired size.
4. Release the **left mouse button**.

Panels

Panels make up the user interface for the FOH. Each component of the screen is a panel defined for a specific function and purpose. The first four panel commands provide an additional submenu enabling you to select a type of panel to define, or to filter the type of panel with which you wish to work.

There are four types of panels in Panel Editor:

Button Functions Panel — Holds button functions, such as menu items, manager functions, order modes, bitmaps, etc.

Order Entry Check Panel — Displays the current order.

Review Check Panel — Displays a mirror image of the current or previous order(s) in the queue bar.

Queue Bar Panel — Displays a visual queue order sequence for the terminal.

You can have more than one of each of the above panel types on the home screen. All panel types are explained later in this chapter.

All panel types must have a name in the 'Panel Name' text box. If the panel name is left blank, the panel is automatically assigned a sequential number in order of panel creation. Naming conventions are often put in place when naming panels to avoid confusion when accessing panels. The panel name displays in numerous dialog boxes with limited text space. It is recommended to abbreviate as much as possible and to make the name descriptive of the function it performs. When dealing with multiple concepts that use different panels, always enter a preceding indicator or prefix, such as DT for Drive Thru, or MGR for Manager. This technique groups panels together when displayed inside selection dialog boxes.

All panel types have a title in the 'Panel Title' text box that displays at the top in a system generated portion of the panel.

The color of the text is defined by the panel's properties. The color of the title bar and panel border displays according to the system's Microsoft Windows® color settings. One technique is to leave the 'Panel Title' text box blank. An unassigned button is then created for a title heading. Refer to the Unassigned button function later in this chapter.

All panels and buttons snap and fit flush to the grid settings defined in the Panel Editor Settings dialog box. This eases the aligning and editing of panel construction.

Create a New Panel

You must create a panel before it can be placed on the Panel Editor workspace. Once created, you can perform any of the other panel commands. There is an option to create a new panel for each panel type, as shown in Figure 5-31:

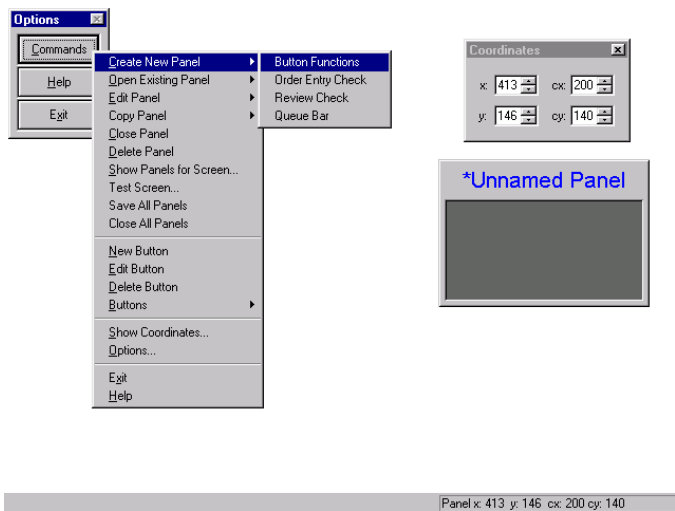


Figure 5-31 Create New Panel

Button Functions Panel

Use the Button Functions option to create panels which you will place buttons. To create a new Button Functions panel, select Create New Panel > Button Functions from the Commands menu. The Edit Panel dialog box displays for the new panel, as shown in Figure 5-32:

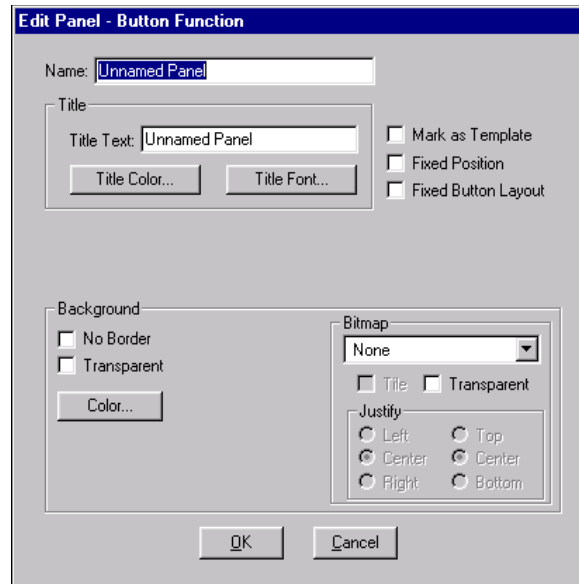


Figure 5-32 Edit Panel - Button Function

Name — Designates a unique name according to the function it performs. Approximately 30 alpha and/or numeric characters can be entered. Two panels can not have the same name. The text, 'Unnamed Panel' is the default panel name.

Naming conventions are often put into place here to avoid confusion when accessing panels. The panel name also displays in numerous dialog boxes with limited text space. It is recommended to abbreviate as much as possible and to make the title descriptive of the function it performs. When dealing with multiple screens that use different panels, always enter a preceding indicator or prefix, such as DR for dining room, or MGR for manager. This technique groups panels together in a list when displayed inside dialog boxes.

Title Inset

Title Text — Designates the text used as the title of the panel. Add text to the title of the panel, if desired. The width of the panel should be considered when selecting a title. The text entered here displays on a system generated portion at the top of the panel. The background color of the system generated portion displays according to the Windows display configuration.

If 'Title Text' is left blank, the panel displays without a system title bar. An unassigned button can be used in place of a title heading, if desired. Refer to the Button Functions section later in this chapter.

Title Color Button

Click Title Color to display the Color dialog box and select a color for the panel heading, only if you enter title text.

To add or change the text color of the panel title:

1. Click **Title Color**. The Color dialog box displays, as shown in Figure 5-33:

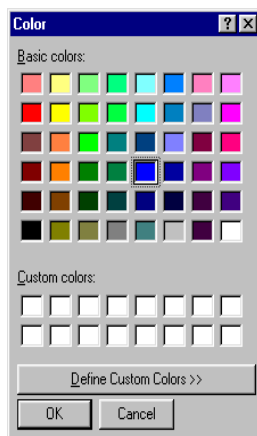


Figure 5-33 Color Dialog Box

2. Select a **color** for the text and click **OK**. You are returned to the Edit Panel dialog box.

Title Font Button

Click Title Font to display the Font dialog box and define the font attributes of the panel heading, only if you enter title text.

To add or change the text font of the panel title:

1. Click **Title Font**. The Font dialog box displays, as shown in Figure 5-34:

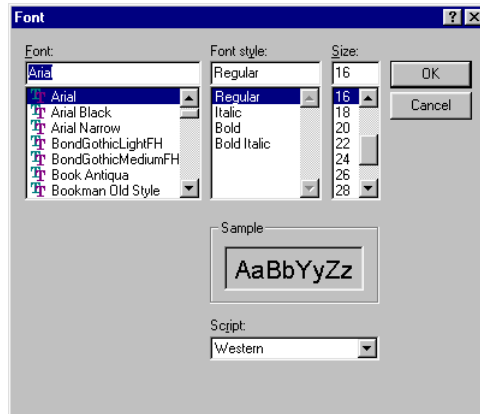


Figure 5-34 Font Dialog Box

2. Select a **font**, **font style**, and **size**, and click **OK**. You are returned to the Edit Panel dialog box.

Mark as Template — Protects the panel as a template and automatically selects the 'Fixed Position' and 'Fixed Button Layout' check boxes. The panel is locked in a fixed location on the workspace, and the corresponding buttons cannot be edited. This also disables some commands on the Commands menu. Panel names that are marked as a template display in brackets in the Existing Panels dialog box.



We recommend you select 'Mark as Template' on all completed panels to prevent accidental changes to the panel. Do not select this option until the panel is complete.

Fixed Position — Locks the panel in a fixed position on the screen, therefore, you can not accidentally move it to another part of the screen.

Fixed Button Layout — Locks the button layout in a fixed position on the panel itself. You can not accidentally move buttons to another position on the panel, or add or delete them.

Background Inset

Add colors to the background of the panel, if desired. In addition, the background can display as transparent for a distinctive 3-D effect. System generated borders on panels are also optional.

No Border — Displays the panel with no borders. This also disables all options in the Title Text inset. The right panel example, shown in Figure 5-35, displays without a border:

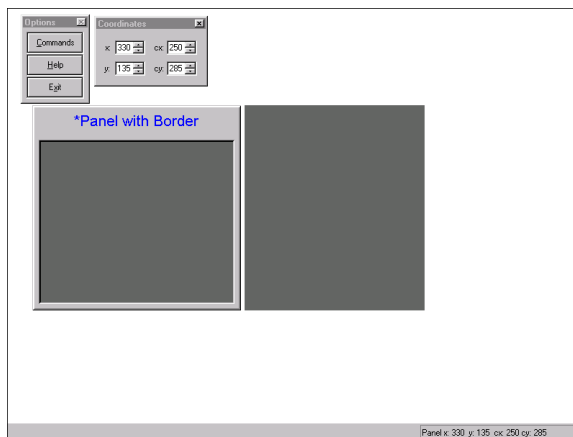


Figure 5-35 Panels with and without a Border

Transparent — Displays the background of the panel as the same color or bitmap of the screen in which the panel resides, creating a 3-D effect. This effect is useful when a color is defined or when bitmaps are attached to the screen in Maintenance > Menu > Screen Editor. The panel displays as transparent, as shown in the left example of Figure 5-36.

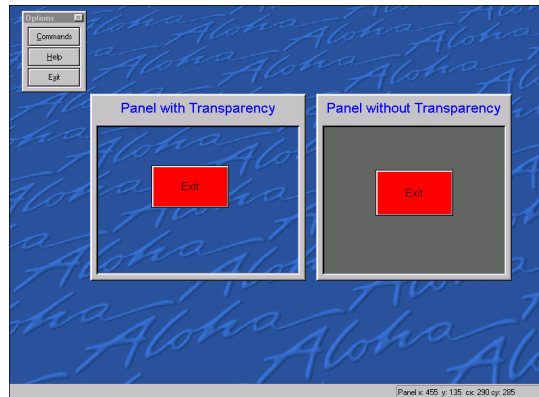


Figure 5-36 Panel Background with and without Transparency

Color Button

Click **Color** to display the Color dialog box and define the background color of the panel.

To add or change the color of the panel background:

1. Click **Color**. The Color dialog box displays (Figure 5-33).
2. Select a **color** for the **background** and click **OK**. You are returned to the Edit Panel dialog box.

Bitmap Inset

Add bitmaps to the background of the panel, if desired. All bitmaps are stored in the ALOHAQS/BMP directory. You can utilize the bitmaps located in the installation CD, or create your own. All graphics must be in bitmap format, and placed in the correct directory.

Bitmap — Displays the bitmap as the background of the panel. To display your own custom bitmaps, such as a company logo, create graphic files, saved as a bitmap, and place them in this directory. Once you select a bitmap, other options in the Bitmap inset become available.

Tile — Displays the bitmap as the background of the panel, in a tiled pattern as shown in the left example of Figure 5-37:

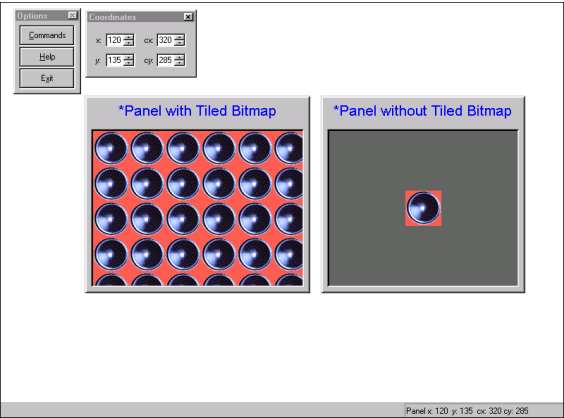


Figure 5-37 Panel Examples with Tiled Bitmap

Transparent — Enables the background color of the bitmap to display as the same color as the panel in which it resides. For example, if a bitmap image of an arrow against a yellow background is placed on a panel with a black background, the yellow background of the bitmap displays as black to match the color of the panel, as shown in Figure 5-38:

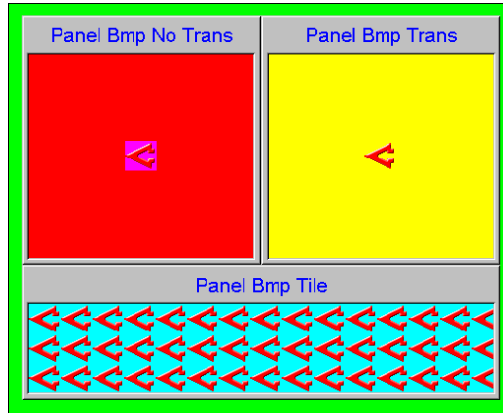


Figure 5-38 Panel Bitmap Examples

Justify Inset

The justification setting determines how the bitmap is displayed on the panel. Select Left, Center, or Right to horizontally align the bitmap on the panel. Select Top, Center, or Bottom to vertically align the bitmap on a panel. Center is selected as the default for both of these.

To select a bitmap and define the justification on the background of the panel:

1. Double-click the desired **panel**, or right-click and select **Edit Panel**. The Edit Panel dialog box displays for the corresponding panel.
2. Select an available **bitmap** from the **Bitmap** drop-down list.
3. Select **Left**, **Center**, or **Right** for the horizontal justification of the bitmap.
4. Select **Top**, **Center**, or **Bottom** for the vertical justification of the bitmap.
5. Click **OK**.

Order Entry Check Panel

Use the Order Entry Check option to create the guest check window for displaying the current order. To create a new Order Entry Check Panel, select Create New Panel > Order Entry Check from the Commands menu. The Order Entry Check dialog box displays, as shown in Figure 5-39:

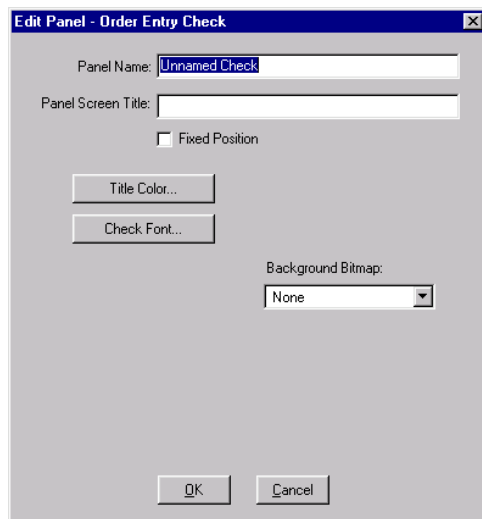


Figure 5-39 Edit Panel - Order Entry Check Dialog Box

Panel Name — Designates a unique name for the panel according to the function it performs. Approximately 30 alpha and/or numeric characters can be entered. The text, 'Unnamed Check' is the default panel name.

Panel Screen Title — Designates the text used as the title of the panel. The text entered here displays on a system generated portion at the top of the panel. The width of the panel should be considered when selecting a title. Normally, the Order Entry Check has no title.

Fixed Position — Locks the panel in a fixed position on the screen, therefore, you can not accidentally move it to another part of the screen.

Title Color Button

Click Title Color to display the Color dialog box and select a color for the title, only if you enter title text.

Check Font Button

Click Check Font to display the Font dialog box and select the font attributes of the panel heading, only if you enter title text.

Background Bitmap — Displays a list of all defined bitmaps held in the ALOHAQS\BMP directory. The bitmap displays as the background of the panel. To display your own custom bitmaps, such as a company logo, create graphic files, saved as a bitmap, and place them in this directory. Once you select a bitmap, other options in the Bitmap inset become available.

Review Check Panel

Use the Review Check option to create additional guest check windows for displaying previous orders in the queue. This is also known as ‘stacker mode’. To create a new Review Check Panel, select Create New Panel > Review Check from the Commands Menu. The Review Check dialog box displays, as shown in Figure 5-40:

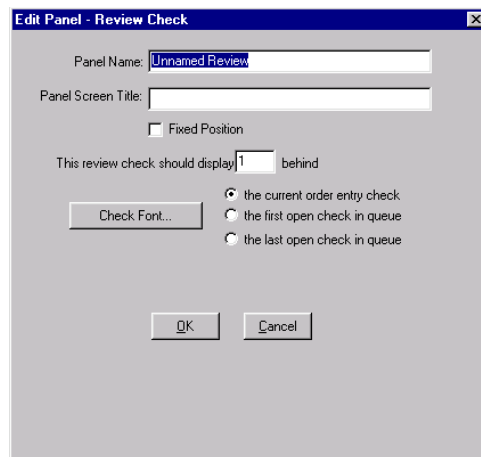


Figure 5-40 Edit Panel - Review Check Dialog Box

Panel Name — Designates a unique name for the panel according to the function it performs. Approximately 30 alpha and/or numeric characters can be entered. The text, ‘Unnamed Review’ is the default panel name.

Panel Screen Title — Designates the text used as the title for the panel. The text entered here displays on a system generated portion at the top of the panel. The width of the panel should be considered when selecting a title.

Fixed Position — Locks the panel in a fixed position on the screen, therefore, you can not accidentally move the panel to another part of the screen.

This review check should display? behind — Specifies the number of orders in the queue order to display in the review check, based on the selection of the next three options. This number can be a positive number to decrement DOWN the queue, or a negative number to increment UP the queue.

To configure this, observe the operation and ordering methods, such as the number of car lengths from the speaker to the takeout window, or the average number of guests in waiting while an order is being prepared.

The Current Order Entry Check — Specifies the order displayed in the review check panel is based on the current or active check in the queue order. When you select any other check as active, the orders displayed in the review check panel(s) change to the orders that follow the current check’s numbering sequence. In Figure 5-41, the last open check is CO504, however, CO502 is

selected as active or current. The two review check panels are defined as 1 and 2 behind to display checks CO501 and CO500, respectively.

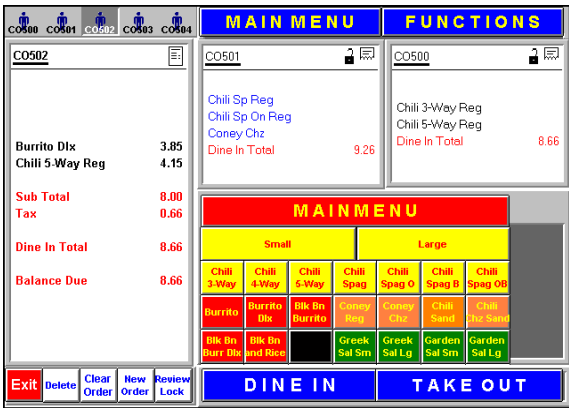


Figure 5-41 Current Order Entry Check in Queue Example

The First Check in Queue — Specifies the order displayed in the review check panel is based on the first open check in the queue order. In Figure 5-42, the current or active check is CO502, however, the first open check is CO500. The review check panels are defined as -1 and -2 behind to display checks CO501 and CO502, respectively. These checks remain the same until CO500 is closed and the next open check becomes the ‘first open check’.

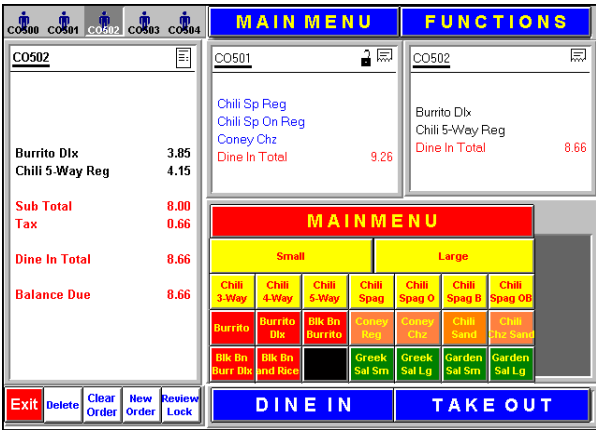


Figure 5-42 First Check in Queue Example

The Last Open Check in the Queue — Specifies the order displayed in the review check panel is based on the last open check or the most recent order in the queue order. In Figure 5-43, the last open check is CO504. The review check panels are defined as 1 and 2 behind to display checks CO503 and CO502, respectively. If you select another check as active, these checks remain the same until you select a new check in the queue.

The screenshot displays the Aloha QuickService POS interface. At the top, a queue bar shows five check numbers: CO500, CO501, CO502, CO503, and CO504. The main interface is divided into three vertical panels for active checks and a central menu grid.

CO504 Panel (Left):

Burrito Dlx	3.85
Sub Total	3.85
Tax	0.32
Dine In Total	4.17
Balance Due	4.17

CO503 Panel (Middle):

Burrito Dlx	
Dine In Total	4.17

CO502 Panel (Right):

Burrito Dlx	
Chili 5-Way Reg	
Togo Total	8.66

Main Menu Grid (Center):

MAIN MENU							
Small				Large			
Chili 3-Way	Chili 4-Way	Chili 5-Way	Chili Spag	Chili Spag O	Chili Spag B	Chili Spag OB	
Burrito	Burrito Dlx	Blk Bn burrito	Coney Reg	Coney Chz	Chili Sand	Chili The Same	
Blk Bn Burr Dlx	Blk Bn and Rice		Greek Sal Sm	Greek Sal Lg	Garden Sal Sm	Garden Sal Lg	

At the bottom, there are control buttons: Exit, Delete, Clear Order, New Order, Review Lock, DINE IN, and TAKE OUT.

Figure 5-43 Last Open Check Example

Check Font Button

Click Check Font to display the Font dialog box (Figure 5-34) and select the font attributes for the panel heading.

Queue Panel

Use the Queue Bar option to create one or many queues for operations that require order queues with different sizes, or locations. The queue is the only panel that displays without a border. For example, a cashier's screen may have limited space, and utilize a small queue, but an expeditor, who typically does not ring sales, utilizes a much larger size queue. All queues show the same orders for a terminal.

To create a new Queue Bar panel, select Create New Panel > Queue from the Commands menu. The Edit Panel - Queue dialog box displays, as shown in Figure 5-44:

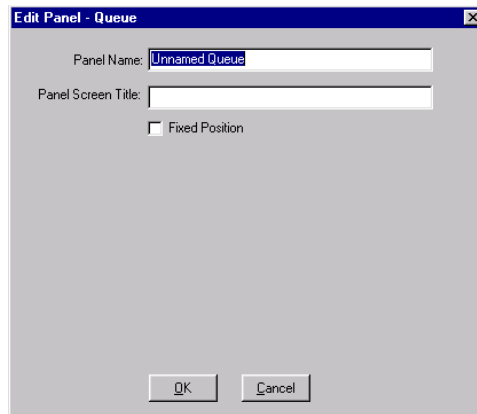


Figure 5-44 Edit Panel - Queue Dialog Box

Panel Name — Designates a unique name for the panel according to the function it performs. Approximately 30 alpha and/or numeric characters can be entered. The text ‘Unnamed Queue’ is the default panel name.

Panel Screen Title — Designates the text used as the title for the panel. The text entered here displays on a system generated portion at the top of the panel. The width of the panel should be considered when selecting a title. Normally, the queue bar has no title.

Fixed Position — Locks the panel in a fixed position on the screen, therefore, you can not accidentally move it to another part of the screen.

Other Panel Commands

Once you create and save a panel, you can open, edit, copy, close, and delete it. When more than one panel is open, you can save and close all of them at once.

Open Existing Panel

Open existing panels to display them on the workspace. Use this command when you want to view and open panels. There is an option for each panel type, as shown in Figure 5-45:

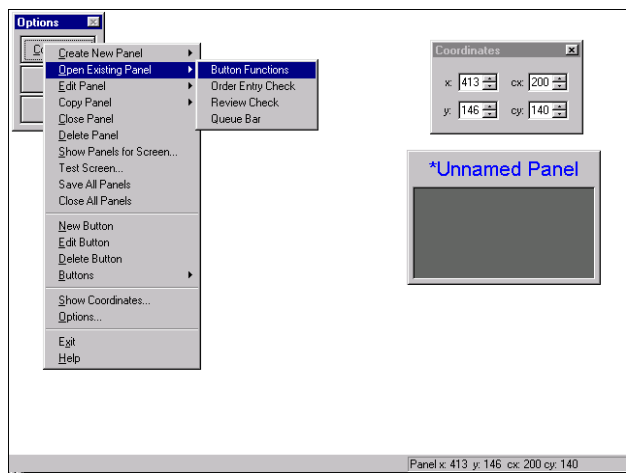


Figure 5-45 Open Existing Panel Options

To open an existing panel:

1. Select **Open Existing Panel** from the Commands menu and select one of the **panel types**. The Panel dialog box displays with all existing panels for the selected type, as shown in Figure 5-46:

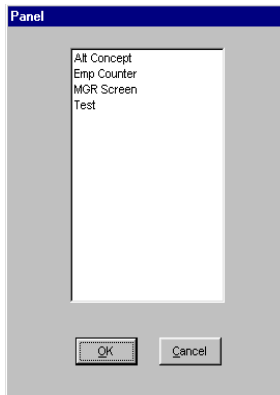


Figure 5-46 Panel Dialog Box

2. Select a **panel** from the list and click **OK**, or double-click the desired **panel**. The panel displays on the workspace.

Edit Panel

Use this command when you want to change the properties of the panel, such as name, appearance, template settings, and more. You must display the panel on the workspace before you can edited it. There is an option for each panel type, as shown in Figure 5-47:

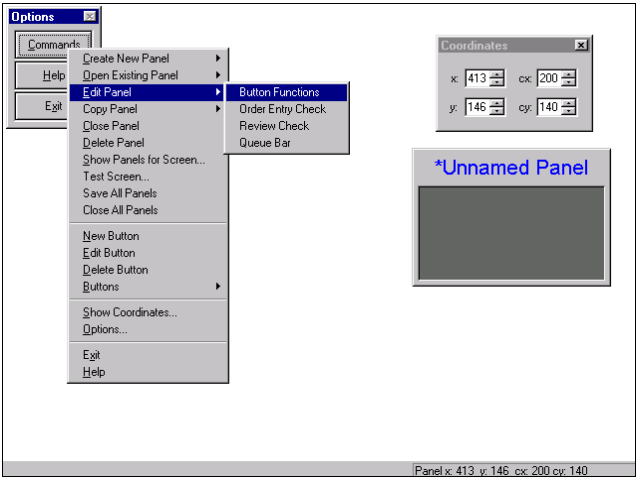


Figure 5-47 Edit Panel Options

To edit an existing panel:

1. Select **Edit Existing Panel** from the Commands menu and select one of the **panel types**.

If there are active or displayed panels in the workspace, the Edit Panel dialog box displays a prompt asking if you want to edit the last active panel for the selected panel type, as shown in Figure 5-48:

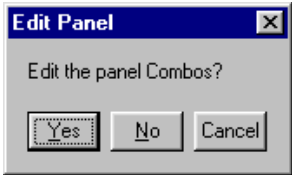


Figure 5-48 Edit Panel Dialog Box

Click **Yes** to edit the panel or click **No** to display the Panel dialog box.

If there are no active or displayed panels on the workspace, the Panel dialog box displays a list of existing panels from which to choose (Figure 5-46).

2. Select the **panel** and click **OK**, or double-click the desired **panel**. The panel displays on the workspace.



You can also double-click an active panel to open the Edit Panel dialog box and change the settings.

3. Edit the **panel** as necessary.

Copy Panel

Use the Copy Panel command to create a duplicate panel. The copied panel inherits all properties, such as name, appearance, template settings, text and color selections, size and location, and all button functions, and more. The copied panel is placed exactly on top of the original panel. Two panels cannot contain the same name. There is an option for each panel type, as shown in Figure 5-49:

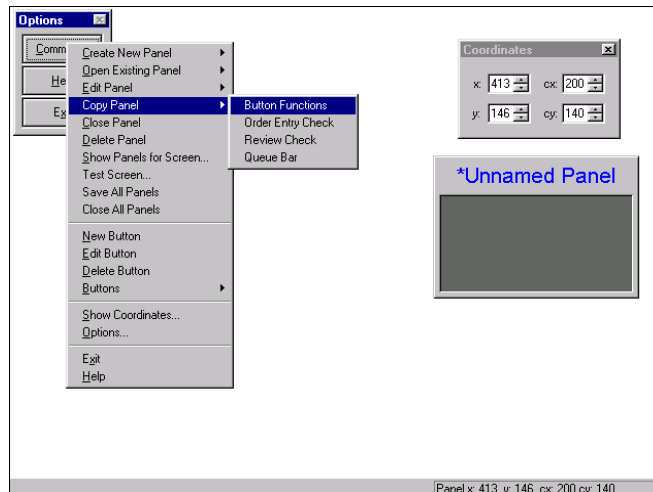


Figure 5-49 Copy Panel Menu Path

To copy a panel:

1. Select **Copy Panel** from the Commands menu and select one of the **panel types**.

If there is an active or displayed panel on the workspace, the command copies the last active panel.

If there are no active or displayed panels, the Panel dialog box displays a list of existing panels from which to choose. Select the **panel** and click **OK**, or double-click the desired panel.

The Edit Panel dialog box displays for the copied **panel**. The text 'Copy of nnn' where 'n' is the name of the original panel, displays in the 'Name' text box.

2. Enter a descriptive **name** for the new **panel** and click **OK**. The new panel displays in the exact location as the original.



We recommend you use the Copy Panel command to create secondary panels that overlay other panels. This ensures the correct placement of panels so that blank spaces do not display on the FOH.

Close Panel

Close panels to remove them from the workspace. This panel command closes the last active panel, if applicable. If there are no active or displayed panels on the workspace, this command is not available. If the workspace has more than one panel displayed, or if none of the panels are active, the Panel dialog box displays with a list of open panels.

To close a panel:

1. Select **Close Panel** from the **Commands** menu. If unsaved changes were made, a dialog box prompts to save the changes.
2. Click **Yes** to save the changes, or click **No** to close the panel without saving.

Delete Panel

Delete panels to remove them from the Aloha system. This panel command deletes the last active panel, if applicable. If there are no active or displayed panels on the workspace, or if the panel is marked as a template, this command is not available. If the workspace has more than one panel displayed, or if none of the panels are active, the Panel dialog box displays with a list of open panels.

To delete a panel:

1. Select **Delete Panel** from the **Commands** menu. The Delete Panel dialog box displays, as shown in Figure 5-50:



Figure 5-50 Delete Panel Dialog Box

2. Click **Yes** to delete the panel, or click **No** to cancel the procedure.

Show Panels for Screen

After you use Screen Editor to combine panels together into a home screen, use this command to view how the screen will look to the end user when it displays in the FOH.

To show panels for screen:

1. Select **Show Panels for Screen** from the **Commands** menu. The Screen dialog box displays with a list of defined screen.
If the screen is not defined, it does not display in the list.
2. Select a **screen** and click **OK**, or double-click the desired **screen**. The collection of panels display on the workspace.

Test Screen

To test a home screen, select Test Screen from the Commands menu. Select from the dialog box displaying a list of the available home screens. This panel command is a limited testing tool for viewing the properties of buttons and the chaining links between panel relationships. Panels and buttons cannot be edited in the Test Screen mode. To exit the Test Screen mode, select End Test Screen from the Commands menu to display a list of options, shown in Figure 5-51:

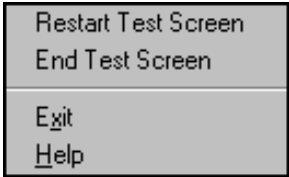


Figure 5-51 Test Screen Dialog Box

Select Restart Test Screen to run the test again, or End Test Screen to clear the screen.

Save All Panels

To save all displayed panels at the same time, select Save All Panels from the Commands menu. Use this panel command when you want to save multiple panels which have unsaved changes.

Close All Panels

To close all displayed panels at the same time, select Close All Panels from the Commands menu. A prompt displays asking if you want to save any changes made to the panels.

Single Buttons

When you create a panel, place buttons on the panel after clearing the 'Mark as Template' and 'Fixed Button Layout' check boxes. You can move, rearrange, and resize buttons in several different ways. Your panels can contain a variety of functions to meet the requirements of a food environment in order to ring, close and modify orders. Buttons are always formed with four right angles in a square or rectangular shape.

If the panel to contain the buttons is not displayed, select Open Existing Panel > Button Functions from the Commands menu. The Panel dialog box displays. Select the panel and click OK.

The Commands menu provides an additional submenu for buttons, as shown in Figure 5-52:

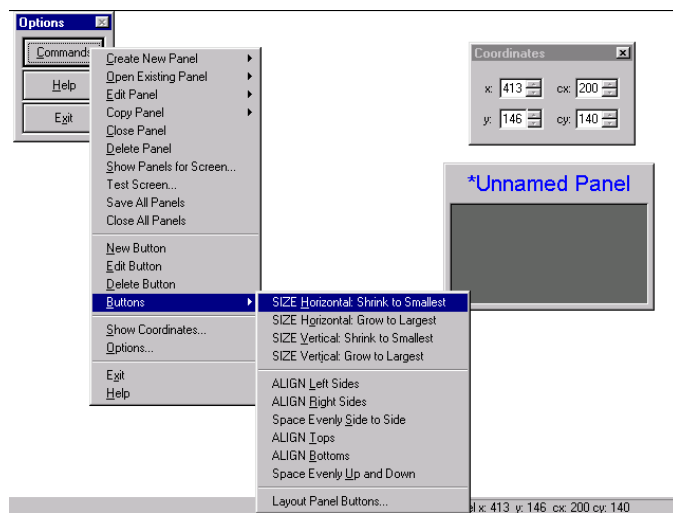


Figure 5-52 Button Submenu

Create a New Button

To add a new button to a panel, select New Button from the Commands menu, or hold down the left mouse button and drag the cursor across the panel in a box pattern. As the button is formed, release the left mouse button. The Edit Button dialog box displays, as shown in Figure 5-53:

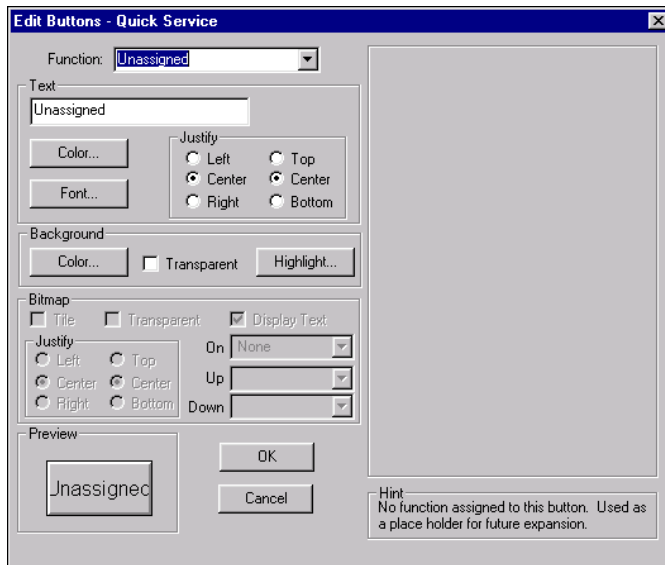


Figure 5-53 Edit Button Dialog Box

Function — Defines the function of the button. The function assigned to a button determines the behavior of the button and how the FOH operates. Every button must have an assigned function and every new button has a default Unassigned function. When you select a function, some require additional information on the right side of the dialog box. The Text, Background, and Bitmap properties may be disabled as well.

Text Inset

Text — Defines the text to display on the button. To display text on multiple lines, insert \n without spaces, for line breaks.

Color Button

Click **Color** to display the Color dialog box and set the color of the button text.

To set the color of the button text:

1. Click **Color**. The Color dialog box displays (Figure 5-33).
2. Select a **color** for the text and click **OK**. You are returned to the Edit Button dialog box.

Font Button

Click **Font** to display the Font dialog box and set the font attributes of the button text.

To set the font attributes of the button text:

1. Click **Font**. The Font dialog box displays (Figure 5-34).
2. Select a **font**, **font style**, and **size** for the button text and click **OK**. You are returned to the Edit Button dialog box.

Text Justify Inset

The justification determines how the text is displayed on the button. Select **Left**, **Center**, or **Right** to horizontally align the text on the button. Select **Top**, **Center**, or **Bottom** to vertically align the text on a button. **Center** is selected as the default for both of them.

To define the justification of button text:

1. Double-click the desired **button**, or right-click and select **Edit Button**. The Edit Button dialog box displays for the corresponding button.
2. Select **Left**, **Center**, or **Right** for the horizontal justification of the text.
3. Select **Top**, **Center**, or **Bottom** for the vertical justification of the text.
4. Click **OK**.

Background Inset

You can add colors to the button background, if desired. In addition, the background can display as transparent for a distinctive 3-D effect. You can also select a color to display on the button when you select it in the FOH.

Color Button

Click Color to display the Color dialog box and set the background color of the button.

To add or change the color of the button background:

1. Click **Color** in the Background inset. The Color dialog box displays (Figure 5-33).
2. Select a **color** for the **button background** and click **OK**. You are returned to the Edit Button dialog box.

Transparent — Displays the background of the panel as the same color or bitmap of the panel in which the button resides, creating a 3-D effect. This effect is useful when a color is defined or when bitmaps are attached to the panel. The button background displays as transparent, as shown in the left example of Figure 5-54.

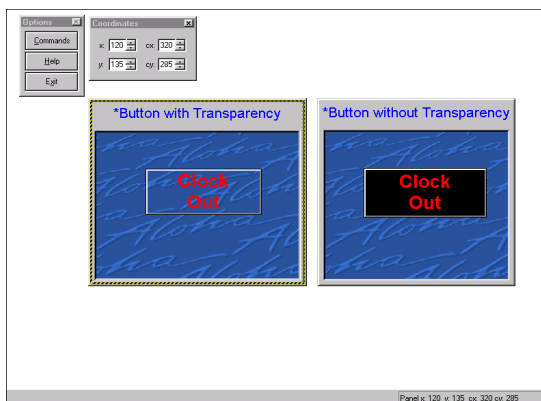


Figure 5-54 Background with or without Transparency Examples

Highlight Button

Click Highlight to display the Color dialog box and define the highlight color of the button. This is the background color to which the button changes when you selected it in the FOH.

To add or change the highlight color of the button background:

1. Click **Highlight**. The Color dialog box displays (Figure 5-33).
2. Select a **color** for the **background** and click **OK**. You are returned to the Edit Button dialog box.

Bitmap Inset

Add bitmaps to the background of the button, if desired. To display your own custom bitmaps, such as a company logo, create the graphic files, save them as bitmaps, and place them in the ALOHAQS\BMP directory. Once you select a bitmap, other options in the Bitmap inset become available.

Tile — Displays the bitmap in a tiled pattern for the button background, as shown in the left example of Figure 5-55:

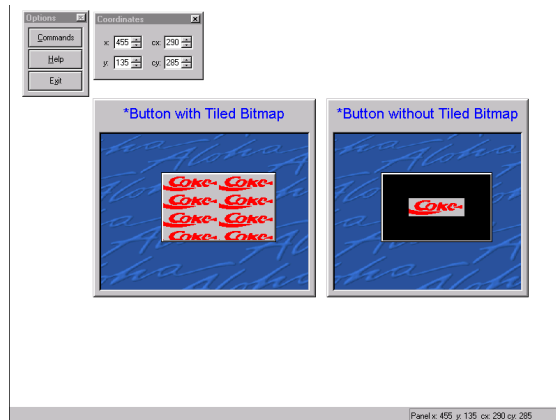


Figure 5-55 Panel Examples with and without Tiled Bitmap

Transparent — Enables the background color of a bitmap to display as the same color as the panel in which it resides. For example, if a bitmap image of an arrow against a yellow background is placed on a panel with a black background, the yellow background of the bitmap displays as black to match the color of the panel, as shown in Figure 5-56:

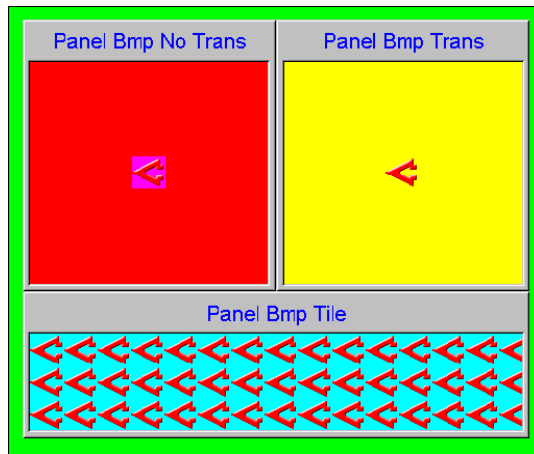


Figure 5-56 Panel Bitmap Examples

Display Text — Displays text over the bitmap. When cleared, this option overrides all text properties and only displays the assigned bitmap.

On — Displays a bitmap on the button. All bitmaps in the ALOHAQS\BMP directory are available for selection. If cleared, no bitmap displays and other bitmap options are unavailable.

Up — Displays a bitmap when you select the button, and is commonly used for bill denominations which are computer enhanced with a ‘depressed’ look. All bitmaps in the ALOHAQS\BMP directory are available for selection. You must use a graphics program to create a bitmap with a ‘depressed’ look. An example is shown on the left side in Figure 5-57:

Down — Displays a bitmap when you release the button and is commonly used with the ‘Up’ check box for bill denominations. All bitmaps in the ALO-

HAQS\BMP directory are available for selection. An example is shown on right side in Figure 5-57:



Figure 5-57 Up and Down Examples of a Ten Dollar Bill

Bitmap Justify Inset

The justification settings determine how the bitmap is displayed on the button. Select **Left**, **Center**, or **Right** to horizontally align the bitmap on the button. Select **Top**, **Center**, or **Bottom** to vertically align the bitmap on the button. **Center** is selected as the default for both of these.

To define the justification of a bitmap on the background of the button:

1. Select an available **bitmap** from the **Bitmap** drop-down list.
2. Select **Left**, **Center**, or **Right** for the horizontal justification of the bitmap.
3. Select **Top**, **Center**, or **Bottom** for the vertical justification of the bitmap.
4. Click **OK**.

Preview Inset

The Preview window displays with a replica of the button's appearance before it is saved.

Hint Line

The Hint line is available for helpful tips for each button function.

Select **OK** to add the button to the panel. Refer to the rest of this section for further information regarding the properties of buttons

Single Button Commands

Once you create a button, you can edit, move, resize, copy, and delete it. When you save the panel in which the button resides, all properties of the button are saved. Use the Coordinates tool where applicable.

Edit Button

Use the Edit Button dialog box to edit the properties of a button, such as text, color, justification, and more. Click the desired button to make it active. If you do not select a button first, the Edit Button dialog box displays for the last active button.

To edit a button:

1. Select **Edit Button** from the **Commands** menu or double-click the **button**. The Edit Button dialog box displays.
2. Make the necessary **changes** to the **properties** of the **button** and click **OK**.

Move and Resize Button

Move a single button to place it in a different location on the panel. Use this command to make button placement flush against other buttons on the panel. Click the desired button to make it active.

To move a button using the Coordinates tool:

1. Adjust the **x coordinate** using the scroll bar to move the button to the left or right. Adjust it higher to move right and lower to move left.
2. Adjust the **y coordinate** using the scroll bar to move the button up or down. Adjust it higher to move up and lower to move down.

To resize a button using the Coordinates tool:

1. Adjust the **cx coordinate** using the scroll bar to reshape the right side of the button. The higher the number, the wider the button becomes.

2. Adjust the **cy coordinate** using the scroll bar, to reshape the bottom side of the button. The higher the number, the taller the button becomes.

You can also move and resize buttons by using the mouse and keyboard. The following procedures depict how to move and resize buttons without the Coordinates tool:

To move a button manually with the mouse:

1. Click the **left mouse button** at the top of the button.
2. Hold and drag the **button** to the desired location.
3. Release the **left mouse button**.

To move a button manually with the keyboard:

1. Click the **left mouse button** at the top of the button.
2. Press the **Up, Down, Left, and Right arrow keys** until the button is at the desired location.

To resize a button manually with the mouse:

1. Place the **cursor** on any **side** of the **button** until a double-sided arrow displays.
2. Click the **left mouse button**.
3. Hold and drag the **button border** until the **button** is at the desired size.
4. Release the **left mouse button**.

Copy Button

Copy a single button to replicate buttons with identical properties, such as text, color, button function, and more. Click the desired button to make it active.

To copy a button:

1. Right-click the desired **button**. The right-click menu displays.
2. Select **Copy**.
3. Right-click on an **empty space** on the **panel**. The right-click menu displays.
4. Select **Paste**. The new button displays on the panel.

Delete Button

Delete a single button to remove it from the Aloha system.

To delete a button:

1. Select the **button** to remove.
2. Select **Delete Button** from the **Commands** menu. A confirmation prompt displays asking if you want to delete the button, as shown in Figure 5-58:



Figure 5-58 Delete Button Confirmation

3. Click **OK**.

Group Buttons

Use Panel Editor to define and place groups of buttons on panels. If the panel to contain the buttons is not displayed, select Open Existing Panel > Button Functions from the Commands menu. The Panel dialog box displays. Select the panel and click OK.

Create a Group of Buttons

To create a group of buttons on a panel, select Buttons > Layout Panel Buttons from the Commands menu. The Layout Panel Buttons dialog box displays, as shown in Figure 5-59:

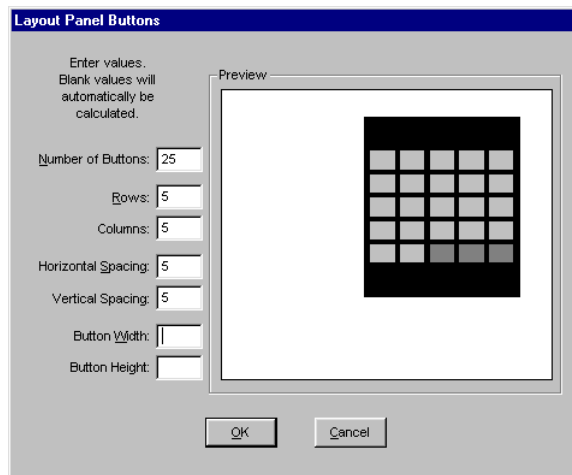


Figure 5-59 Layout Panel Buttons Dialog Box

A basic grid showing the layout of the buttons displays in the Preview window. The grid reflects the numeric values entered in the text boxes to the left of the window. If any are left blank, the system automatically generates default amounts to complete the button layout in a logical manner.

Number of Buttons — Designates the number of buttons to place on the panel. If you are unsure of the number of desired buttons, we recommend you select a low number. Once a number is selected and saved, the number cannot be edited for a lower number. The system remembers the previous number and displays the following error message, as shown in Figure 5-60:

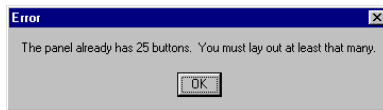


Figure 5-60 Layout Panel Button Error



You can place a total of 50 buttons on a panel.

Rows — Specifies the number of horizontal rows to place on the panel.

Columns — Specifies the number of vertical columns to place on the panel.

Horizontal Spacing — Specifies the number of pixels to use to separate the buttons horizontally.

Vertical Spacing — Specifies the number of pixels to use to separate the buttons vertically.

Button Width — Specifies the number of pixels to use for the width of all buttons on the panel.

Button Height — Specifies the number of pixels to use for the height of all buttons on the panel.

Click OK to display the button layout design centered in the middle of the panel. All buttons default to the Unassigned button function.

If any buttons are outside the panel in the Preview window when you click OK, an error message displays, as shown in Figure 5-61:



Figure 5-61 Layout Panel Buttons Error

Click OK to adjust the numeric values of your settings.

The Layout Panel Buttons command is only one method to fill a panel with buttons. Once proficient, most users copy and paste already assigned buttons onto the panel to retain the properties of the button and reassign the function.

Group Button Commands

Use the rubberbanding technique to select the group of buttons to edit, format, or delete. To use this technique, hold down the shift key, and click the left mouse button on the panel outside of the buttons. Drag the arrow that displays across the desired buttons. A broken line selection guide (rubberband) displays as a tool to make the button selection, as shown in Figure 5-62:

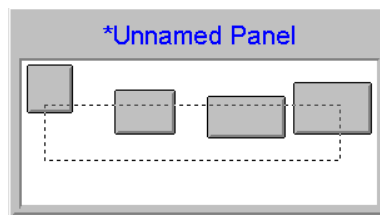


Figure 5-62 Rubberbanding Buttons

The width and height of the rubberband changes as it is dragged across the buttons. Release the left mouse button and the button submenu displays a list of 'group' button commands, as shown in Figure 5-63:



Figure 5-63 Right Click Rubberband Commands

Select a command from the button submenu. The buttons adjust according to the selected command.



To use the rubberbanding feature, you must clear the 'Mark as Template' and 'Fixed Button Layout' check boxes for the panel you are editing.

Move a Group of Buttons on a Panel

To move a group of buttons on a panel, select the buttons using the 'rubberbanding' technique. The button submenu displays. DO NOT select from the button submenu. Click one of the selected buttons, move the selection to the desired location, then release the left mouse button, as shown in Figure 5-64:

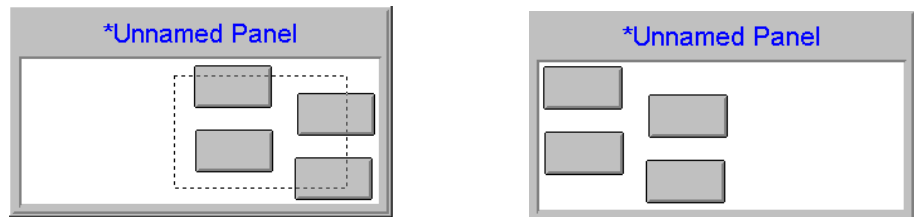


Figure 5-64 Move a Group of Buttons on a Panel

Size Horizontal: Shrink to Smallest

To resize a group of buttons to the width of the thinnest button, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select SIZE Horizontal: Shrink to Smallest. The selected buttons horizontally resize based on the width of the thinnest button, as shown in Figure 5-65:

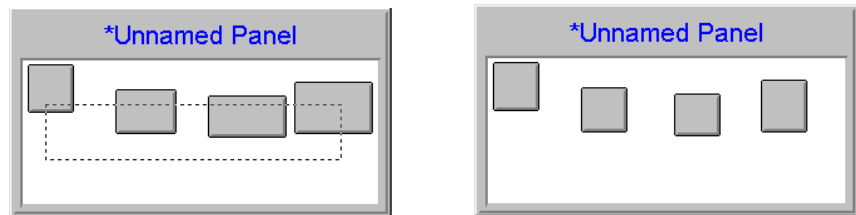


Figure 5-65 Size Horizontal: Shrink to Smallest

Size Horizontal: Grow to Largest

To resize a group of buttons to the width of the widest button, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select **SIZE Horizontal: Grow to Largest**. The selected buttons resize based on the width of the widest button, as shown in Figure 5-66:

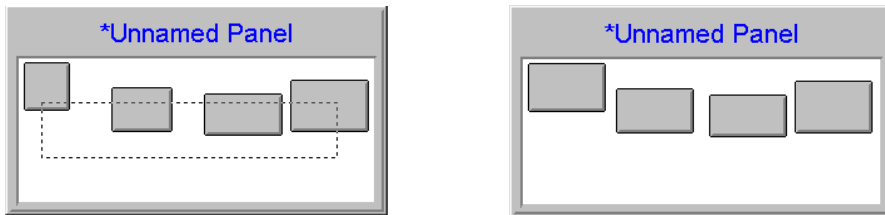


Figure 5-66 Size Horizontal: Grow to Largest

Size Vertical: Shrink to Smallest

To resize a group of buttons to the height of the shortest button, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select **SIZE Vertical: Shrink to Smallest**. The selected buttons resize based on the height of the shortest button, as shown in Figure 5-67:

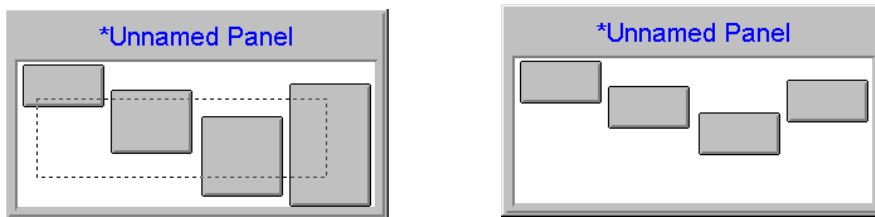


Figure 5-67 Size Vertical: Shrink to Smallest

Size Vertical: Grow to Largest

To resize a group of buttons to the height of the tallest button, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select **SIZE Vertical: Grow to Largest**. The selected buttons resize based on the height of the tallest button, as shown in Figure 5-68:

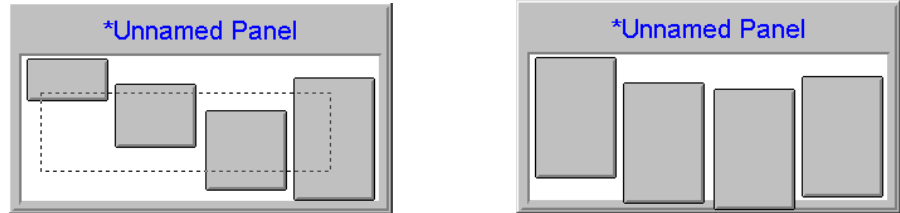


Figure 5-68 Size Vertical: Grow to Largest

Align Left Sides

To align the left sides of a group of buttons, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select **Align Left Sides**. The selected buttons align with the far left button, as shown in Figure 5-69:

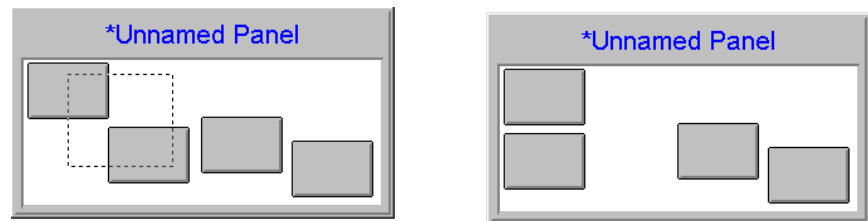


Figure 5-69 Align Left Sides

Align Right Sides

To align the right sides of a group of buttons, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select Align Right Sides. The selected buttons align with the far right button, as shown in Figure 5-70:

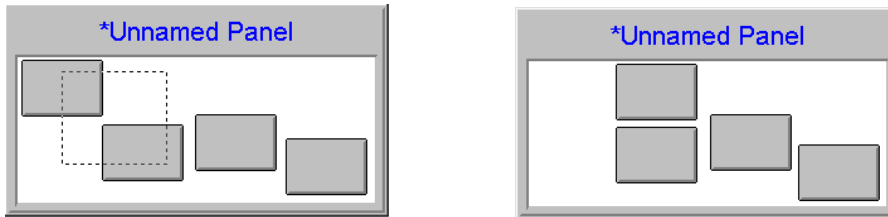


Figure 5-70 Align Right Sides

Space Evenly Side to Side

To place an even amount of space between a group of horizontal buttons, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select Space Evenly Side to Side. The selected buttons space evenly in a horizontal row based on the outermost button, as shown in Figure 5-71:

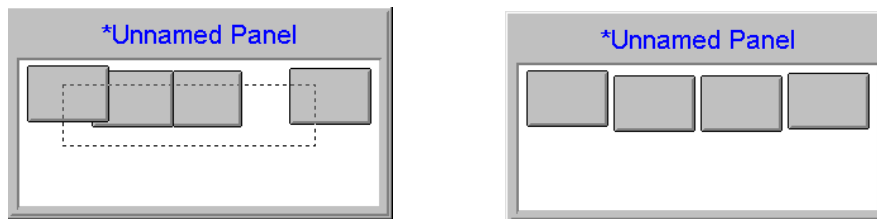


Figure 5-71 Space Evenly Side to Side

Align Tops

To align the tops of a group of buttons, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select Align Tops. The selected buttons align with the topmost button, as shown in Figure 5-72:

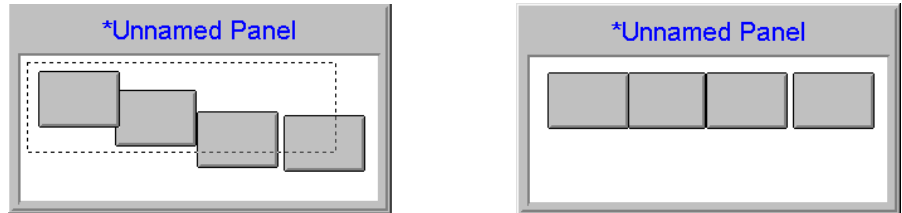


Figure 5-72 Align Tops

Align Bottoms

To align the bottoms of a group of buttons, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select Align Bottoms. The selected buttons align with the bottommost button, as shown in Figure 5-73:

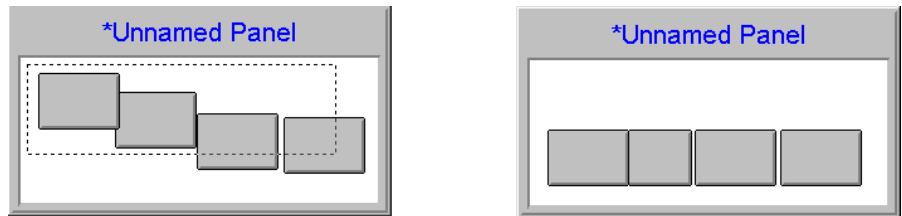


Figure 5-73 Align Bottoms

Space Evenly Up and Down

To place an even amount of space between a group of vertical buttons, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select Space Evenly Up and Down. The selected buttons space evenly in a vertical row based on the outermost button, as shown in Figure 5-74:

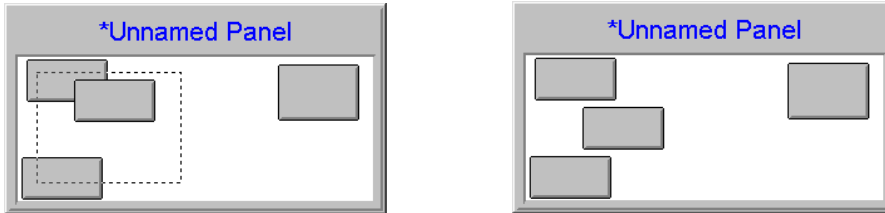


Figure 5-74 Space Evenly Up and Down

Format a Group of Buttons

To format a group of buttons or copy the attributes of the first created button within a selection, select the buttons using the 'rubberbanding' technique. The button submenu displays. Select Format Buttons. The Format Buttons dialog box displays, as shown in Figure 5-75:

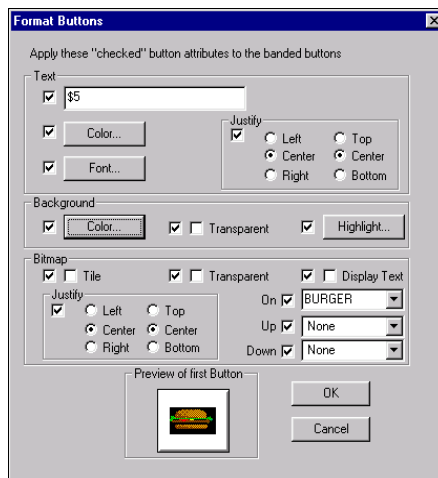


Figure 5-75 Format Buttons Dialog Box

Text Inset

Text — Applies the button text to all ‘rubberbanded’ buttons. Select the check box to apply the button text of the first created button in the rubberband or enter the text in the text box.

Color — Designates the text color for all ‘rubberbanded’ buttons. Select the check box to apply the text color of the first created button to all selected buttons in the rubberband.

Color Button

Click Color to display the Color dialog box and set the color of the button text for all buttons in the rubberband.

Font — Applies the button font to all ‘rubberbanded’ buttons. Select the check box to apply the same button font of the first created button in the ‘rubberbanded’ buttons.

Font Button

Click Font to display the Font dialog box and set the font attributes for all buttons in the rubberband.

Text Justify Inset

The justification setting determines how the text is displayed on the button. Select Left, Center, or Right to horizontally align the text on the button. Select Top, Center, or Bottom to vertically align the text on a button. Center is selected as the default for both of these.

To select and define the justification of button text on a group of buttons:

1. Select a **group of buttons** using the ‘rubberbanding’ technique and select **Format Buttons**. The Format Buttons dialog box displays for the corresponding button.
2. Select **Justify**.
3. Select **Left**, **Center**, or **Right** for the horizontal justification of the text.

4. Select **Top**, **Center**, or **Bottom** for the vertical justification of the text.
5. Click **OK**.

Background Inset

Color — Designates the background color for all ‘rubberbanded’ buttons. Select the check box to apply the same background color to all selected buttons in the rubberband.

Color Button

Click **Color** to display the Color dialog box and set the background color of all ‘rubberbanded’ buttons.

Transparent — Enables the background of all ‘rubberbanded’ buttons to be the same color as the background color of the panel in which it resides.

Highlight — Designates the highlight color for all ‘rubberbanded’ buttons to display when you select the FOH button.

Highlight Button

Click **Highlight** to display the Color dialog box and set the color of all ‘rubberbanded’ buttons when you select the FOH button.

Bitmap Inset

To assign a bitmap to a button, place a bitmap in the \ALOHAQS\BMP directory. The following options are available:

Tile — Displays the bitmap as tiled on all ‘rubberbanded’ buttons.

Transparent — Enables the background of the bitmap to be the same color as the background of the panel it resides on all ‘rubberbanded’ buttons.

Display Text — Displays text over the bitmap on all ‘rubberbanded’ buttons. When cleared, this option overrides all text properties and only displays the assigned bitmap.

On — Assigns a bitmap, if available, to display on all ‘rubberbanded’ buttons. This option displays the bitmap on the button. If cleared, no bitmap displays and other bitmap options are unavailable.

Up — Assigns a bitmap, if available, to display on all ‘rubberbanded’ buttons when you select the button in the FOH.

Down — Assigns a bitmap, if available, to display on all ‘rubberbanded’ buttons when you release the button in the FOH.

Bitmap Justify Inset

Select the horizontal and vertical justification for the bitmap to display on all ‘rubberbanded’ buttons, with Center as the default selection for both directions.

To select a bitmap and define the justification on the background of a group of buttons:

1. Select a **group of buttons** using the ‘rubberbanding’ technique and select **Format Buttons**. The Format Buttons dialog box displays for the corresponding button.
2. Select an available **bitmap** from the **Bitmap** drop-down list.
3. Select **Left**, **Center**, or **Right** for the horizontal justification of the bitmap.
4. Select **Top**, **Center**, or **Bottom** for the vertical justification of the bitmap.
5. Click **OK**.

Preview of First Button Inset

The Preview window displays with a replica of the first created button selected in the rubberband, before it is saved.

Select OK to format the buttons on the panel. Refer to the rest of this chapter for further information regarding the properties of buttons

Delete a Group of Buttons

This command displays on the Button submenu when you right click a panel to perform maintenance.

To delete a group of existing buttons:

1. Select the **buttons** using the 'rubberbanding' technique. The button submenu displays.
2. Select **Delete Button**. A confirmation message displays.
3. Click **OK** to delete the button, or click **Cancel** to end the procedure.

Button Functions

The Edit Button dialog box (Figure 5-53), defines the function performed by the button and its properties. The function determines the behavior of the button and how the FOH operates, regardless of any text, bitmap, and color selections. When you select a function, the button text assumes the name of the function. Every new button has an Unassigned function as default. Select a function and click OK.

To add a basic function to a button:

1. With the necessary panel active, select **New Button** from the **Commands** menu. The Edit Button dialog box displays.
2. Select the **button function**. A prompt asking if you want to change this button's function displays.
3. Click **Yes** to continue, or **No** to cancel the procedure.
4. Enter a unique **name** as the **Text**, or accept the default description.
5. Complete the available **button attributes** on the left side of the Edit Button dialog box, such as color, font, and more.
6. Click **OK**. The button displays on the panel.

This is the basic procedure for adding a function to a button. Some functions provide additional options on the right side of the Edit Button dialog box. When additional options are available, a procedure specific to the function is provided immediately following the function description. This procedure assumes the necessary panel is active, you have selected New Button from the Commands menu, and you have completed the button attributes on the left side of the screen using the information provided earlier in this section.

The following lists each button function and its purpose:

(*) Denotes functions we recommend for managers or higher level employees to access. Most functions are controlled by the employee's access level and job code. Refer to Chapter 5, Labor Maintenance Functions, for more information on Access Levels and Job Codes.

Adjust Tender *

Enables adjustments to the tender information for a guest check that has been closed. The check must be recalled and displayed on the screen before the adjustment can be made.

Adjust Tips *

Enables adjustments to tip information for a guest check that has been closed. This is typically used for guest checks paid with a credit card. You must recall the check and display it on the screen before you can make the adjustment.

Allow Clock-In *

Enables an employee who is not scheduled to work or has clocked-out to clock-in again, if his/her job code has the 'shift required' check box selected. It also overrides labor scheduling constraints, if that program is in use.

Assign Day Part

Enables the employee to change the current day part and opens the FOH Select Day Part screen.

Assign Drawer

Enables the employee to self-assign a cash drawer and opens the FOH Select Drawer screen.

Assign Driver *

Opens the FOH Assign Driver screen with a list of the available drivers that may be assigned to an order. It is only used with Aloha Delivery/Frequent Buyer.

Assign Pen ID's *

Opens the FOH Assign Pen ID screen and enables the employee to select an employee number to encoded pen used to log in. This is only used with Pen IDs.

Bitmap

Assigns a bitmap to a button and is not used for order entry. Any bitmap found or added to the \ALOHAQS\BMP directory is available. Common graphics are company logos.

Break

Opens the FOH Clock-Out screen enabling the employee to select a paid or unpaid break.

Break In/Out *

Opens the FOH Enter Employee Number screen to enable an employee to check in or out from a break, even though another employee is assigned to the terminal or drawer.

Bump Delivery Order

Bumps to the next order in the queue. This function works in conjunction with remote display systems.

Calibrate *

Realigns the pressure point on the POS terminal to coincide with the panel button.

Chain

Opens another panel or collection of panels. For example, a Burger button might chain to a Burgers panel containing buttons for all available burgers on the menu. The Chain function can also be used as a Back button to return you to a previous panel or to access other home screens by selecting multiple panels.

To add a chain button:

1. Select **Chain** from the **Function** drop-down list. Additional options display, as shown in Figure 5-76:

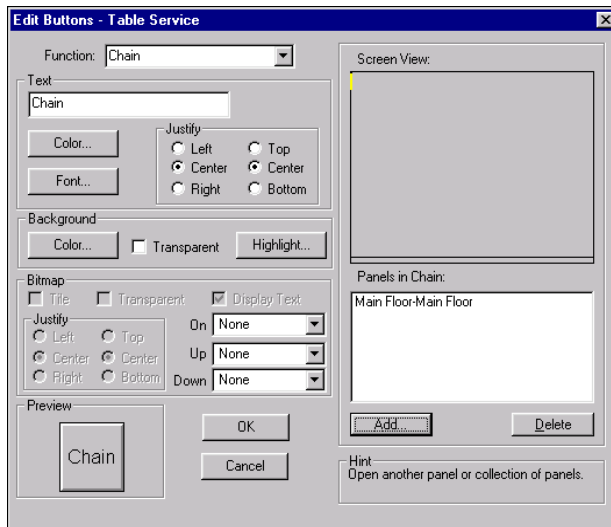


Figure 5-76 Chain Button Function

2. Enter a unique **name** that is descriptive of the **panel** to which you are chaining, such as Section One, or Bar.
3. Click **Add**. The Panel dialog box displays with a list of existing panels.
4. Select the **panel** you wish to open when this button is selected in the FOH, such as a panel for beverages, and click **OK**. The Edit Button dialog box returns with a replica of the panel displayed in the 'Screen

View' box. The panel title and name display in the 'Panels in Chains' list box.



Remember, when you work with multiple panels, any panel that is partially or fully covered in the 'Screen View' box does not display on the FOH.

5. Click **OK**.

To delete a panel in a chain function:

1. Select the unwanted **panel** in the **Panels in Chain** list box.
2. Click **Delete**.
3. Repeat **steps 1 and 2** to delete multiple panels in this chain command until all the panels you want to remove are deleted.
4. Click **OK**.

Change Password

Opens the FOH Change Password system screen, enabling an employee to change their password.

Change Size

Changes the item and modifiers associated with the item as defined as a size group in Maintenance > Menu > Size Groups. For example, you can change a small sandwich and the corresponding small portion ingredients defined as modifiers, to a large sandwich with large portion ingredients with one button selection.

To add a change size button:

1. Select **Change Size** from the **Function** drop-down list. Additional options display, as shown in Figure 5-77:

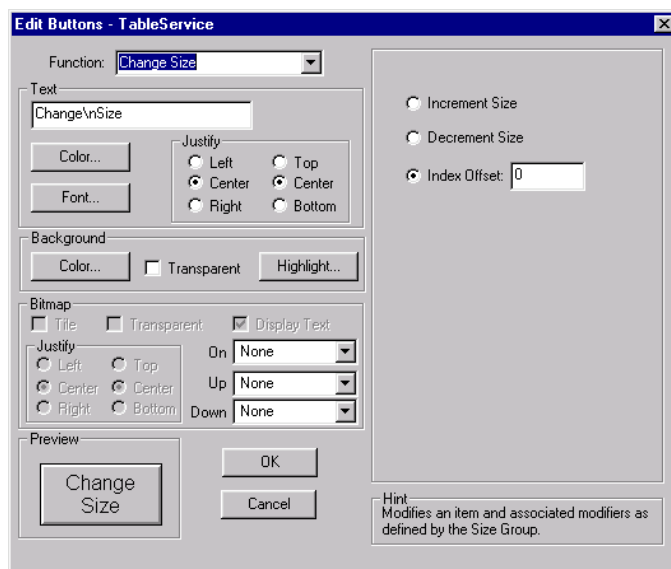


Figure 5-77 Change Size Button Function

2. Select **ONE** of the following **options**:

Increment Size — Increments the item to the next level according to the hierarchy of the size group. For example, a 12 oz. can soft drink (Item 1) is incremented to the next size group level of a 16 oz. can soft drink (Item 2).

Decrement Size — Decrements the item to the next level according to the hierarchy of the size group. For example, a large pizza (Item 1) is decremented to the next size group level of a medium pizza (Item 2).

Index Offset — Changes the item's association based on a preset size group level defined in Maintenance > Menu > Size Groups. For example, an Index Offset of 3 indicates a small sandwich (Item 1), can be changed to a large sandwich (Item 3).

3. Click **OK**.

Check Info

Opens the Check Information screen and adds additional information to a defined text file in \DATA. This function is used to capture a single line of information for such things as marketing or frequent dining information.

To add a Check Info button:

1. Select **Check Info** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-78:

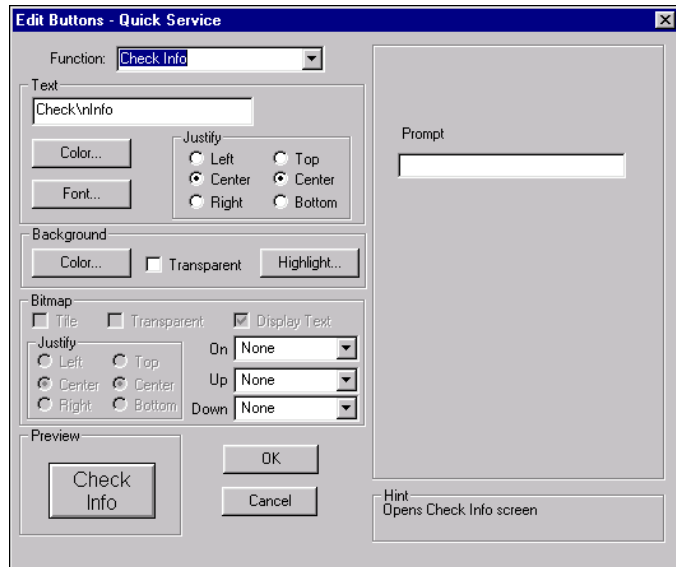


Figure 5-78 Check Info Button Function

2. Enter the **text** for the Check Information screen prompt in the **Prompt** text box.
3. Click **OK**.

Checkout

Opens the “Are you sure you want to check out?” screen, enabling you to run the checkout process.

To add a checkout button:

1. Select **Checkout** from the **Function** drop-down list. Additional options display, as shown in Figure 5-79:

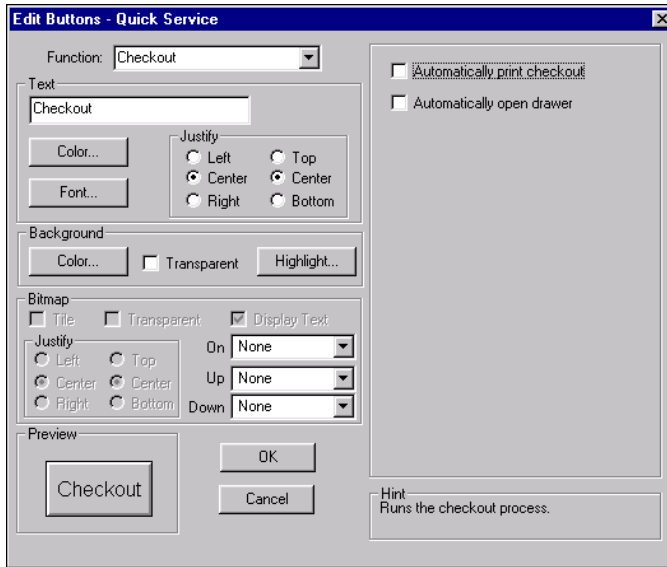


Figure 5-79 Checkout Button Function

2. If desired, select **Automatically print checkout** to print the checkout report when the employee has completed the checkout process.
3. If desired, select **Automatically Open Drawer** to open the cash drawer when the employee has completed the checkout process.
4. Click **OK**.

Clear

Clears all unordered items from the current check.

Clear Password *

Clears an employee's password after you choose the employee from the FOH Select Employee to Clear Password screen. The next time the employee logs in to the FOH, a message displays indicating their password has been cleared and the employee's ID number is used. Another password can be assigned using the Change Password button function.

Clock In/Out *

Clocks an employee in or out after you select them from the FOH Enter Employee Number screen, even though another employee is assigned to the terminal. An employee that has not checked out, can not be clocked out.

Clock Out

Clocks the employee out. An employee that has not checked out, can not clock out.

Close Check

Closes the guest check.

To add a close check button:

1. Select **Close Check** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-80:

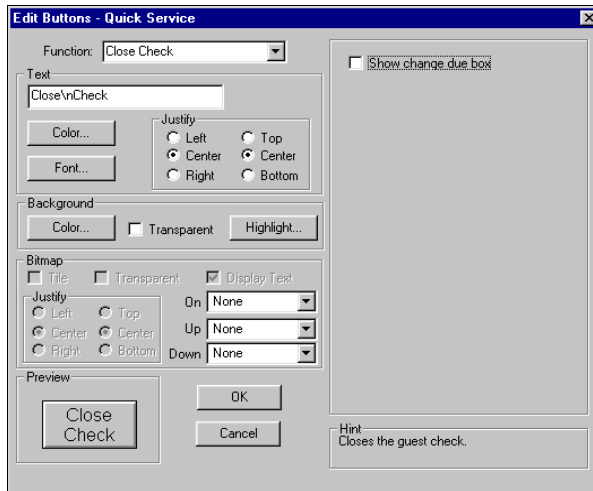


Figure 5-80 Close Check Button Function



The Close Check function is usually included in scripts for tenders.

2. If necessary, select **Show Change Due** to prompt a FOH message showing the change due to the guest.
3. Click **OK**.

Combine Order

Enables the employee to combine two checks together and opens the Scan or Enter Receipt Number screen.

Comp

Applies the specified comp to the guest check.

To add a comp button:

1. Select **Comp** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-81:

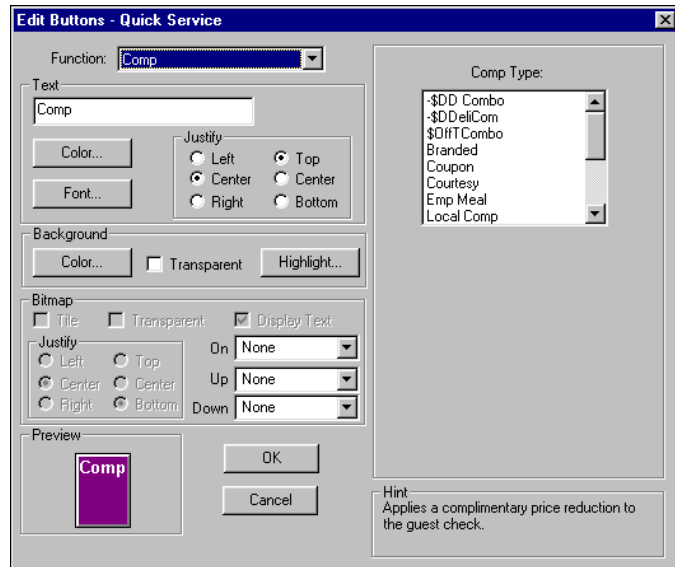


Figure 5-81 Comp Dialog Box

2. Select the **comp** to assign the button from the **Comp Type** list box. If manager access is required, the system displays a password keypad.
3. Click **OK**.

Customer Information

Opens the delivery screen for reviewing information regarding a specific customer, if the Delivery/Frequent Buyer is in use.

Customer Reward Report

Prints a report with the bonuses a customer has earned, if the Delivery/Frequent Buyer is in use.

Delete

Behaves differently in the FOH, depending on the context in which it is used. If you select nothing on the guest check, the last unordered item on the check is deleted. If you select an unordered item on the check, only that item is deleted. If one of these scenarios affects an ordered item, it becomes a void, prompting for a void reason.

To add a delete button:

1. Select **Delete** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-82:

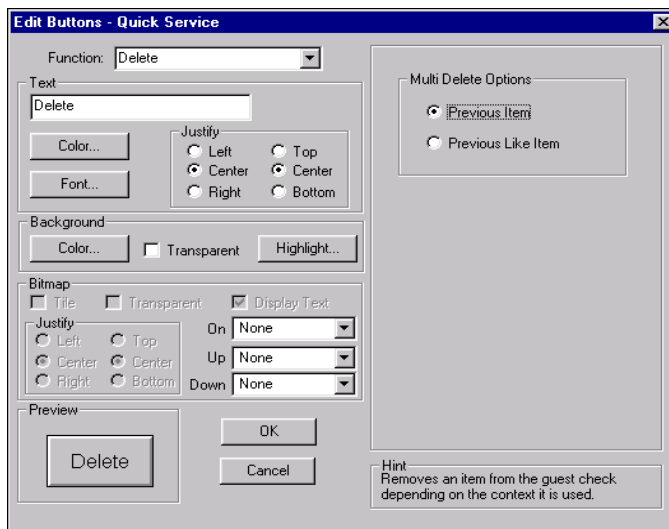


Figure 5-82 Delete Button Function

2. Select **ONE** of the following **options**:

Previous Item — Deletes the last ordered or selected item. This is the default selection.

Previous Like Item — Deletes the last ordered or selected item in conjunction with a button assigned with a quantity function. This function behaves the same way as ordering items in quantity. Ex: If 21 cookies are selected, but 15 is the actual amount, select the quantity 6, then select a button assigned with the Delete Previous Like

Items function. Six cookies are deleted and the guest check window displays with only 15.

3. Click OK.

Delete All Items *

Behaves differently for items that have been ordered and those that have not. The Delete All Items button deletes all items that have been ordered from the guest check in the same manner as Clear. However if items have been ordered, the Void Reasons screen displays and a reason must be selected before the items can be deleted. In this scenario, the items are 'voided' from the guest check.

Delete Checkout *

Deletes an employee's Checkout after the employee is chosen from the FOH Select the Employee's Checkout to Delete screen.

Delete Clockout *

Deletes an employee's clockout after the employee is chosen from the FOH Select the Employee's Clockout to Delete screen.

Delivery

Activates the delivery screens if using the Aloha Delivery/Frequent Buyer product.

To add a delivery button:

1. Select **Delivery** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-83:

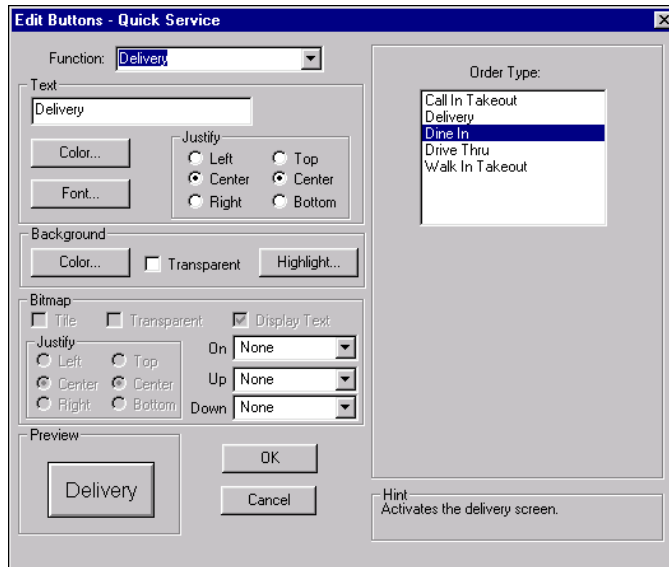


Figure 5-83 Delivery Button Function

2. Select an **order mode** from the **Order Type** list box to designate the order type to assign to the button.
3. Click **OK**.

Delivery Information

Displays information regarding the delivery order, if the Delivery/Frequent Buyer is in use.

Disable Labor Schedule

Disables the Aloha Labor Scheduler product, if in use.

Display Order Total

Displays a ‘Your Total is...’ message on the display board screen, followed by the balance of the current check. Most likely you will include this function in a script with the Send button function when display boards are in use. When you press ‘Send’ from the FOH the ‘Your Total is...’ message displays. The message displays under the following conditions:

- An item is ordered on a new order.
- A new menu item is added to the current order.
- A comp, promo, tax exemption, or another element which affects the balance, is added to the current order.

The message disappears when you start a new order, or when the time set in the ‘Display Message for ___ Seconds’ text box expires. It does not display when you recall an order after a new check is started.

To add a Display Order Total button:

1. Select **Display Order Total** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-83:

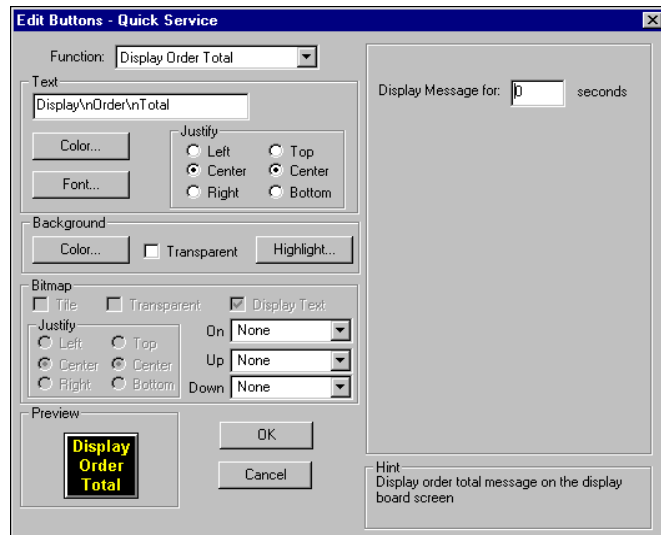


Figure 5-84 Display Order Total Function

2. Type the number of seconds in the **Display Message for __ Seconds** check box to determine how long the message displays before you start a new order.
3. Touch **OK**.

Edit Break *

Enables edits to an employee's break after you select the employee from the FOH Select the Employee to Edit Break screen.

Edit Time *

Enables edits to an employee's clock in and out time after you select the employee from the FOH Select the Employee to Edit Clock In Time screen.

End Of Day *

Invokes the End-of-Day process.



***End-of-Day is usually performed as a scheduled event.
The accidental selection of this button at the FOH starts a
new day of business.***

Eject Cash Card

Ejects a cash card from a cash card device.

Enter Advance Order

Displays the FOH Enter Advance Order screen to allow you to enter guest and order information for advance orders.

Exit

Logs the employee out of the system and returns to the logon screen.



Refer to the
Advance
Orders feature in the Special Features Guide for
more information on setting up advance orders.

Force Tender *

Enables the entry of credit card information without having to make a phone connection through the modem to receive credit card authorization. This is used when the file server goes down and you must tender a guest check.

Get Check

Opens the FOH Enter Check Number screen, enabling the employee to get an open check for tendering.

Item Lookup *

Invokes an item look up screen used for searching through all items whether they are defined on a panel or not. When the employee touches the Item Lookup button, a list of items and a keypad display. As the employee enters the item number or description, the list displays only items that match the characters the employee has entered. The employee can keep entering characters or choose an item from the list. After choosing an item, the item number, item description, and price display.

Kodiak Entry

Makes a COM connection to get required data from a program outside of the Aloha system. This function is specific to the Kodiak Company, and signifies a charge at a set rate when entering the parking garage.

Kodiak Exit

Makes a COM connection to get required data from a program outside of the Aloha system. This function is specific to the Kodiak Company, and signifies an hourly rate charge when exiting the parking garage.

Manage Advance Orders

Displays the FOH Manage Advance Orders screen to allow you to view, print, and edit ordered and unordered advance orders.



Refer to the
Advance

Orders feature in the Special Features Guide for more information on setting up advance orders.

Manage Delivery Drivers *

Opens the FOH Manage Drivers screen, listing the drivers for assigning orders, if the Delivery/Frequent Buyer is in use.

Manage Delivery Orders *

Opens the FOH Delivery Orders screen, listing all delivery orders, if the Delivery/Frequent Buyer is in use.

Manage Drawers *

Opens the FOH Assign Cash Drawer screen to assign cash drawers and perform cash in/cash out transactions for all available drawers.

Modifier Code

Specifies a preceding preparation code for item modifiers, such as No, Extra, Side, etc. You must touch this button before an order modifier.

To add a modifier code:

1. Select **Modifier Code** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-85:

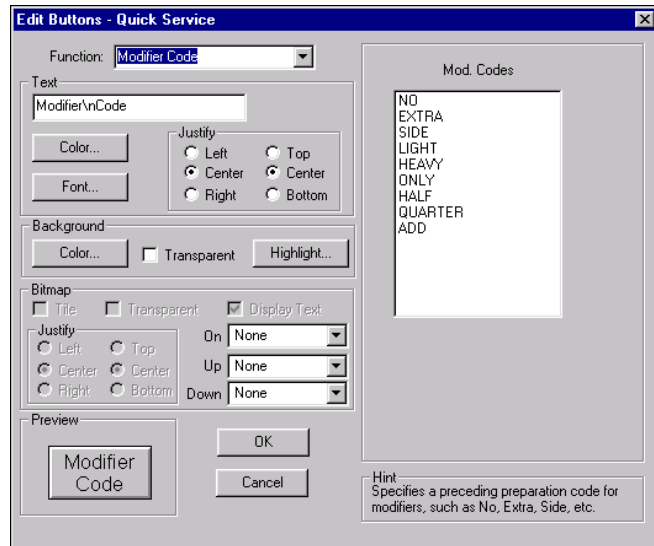


Figure 5-85 Modifier Code Button Function

2. Select a **modifier code** to assign to the button from the **Mod Codes** list box.
3. Click **OK**.

Modify

Opens the FOH Modify screen for the selected menu item on the order. If no modifiers are attached to the selected menu item, the screen displays with no modifiers to select.

Name Order

Displays a qwerty typewriter keypad so that an order can be named.

New Order

Opens a blank new order screen, however, the FOH can be defined to automatically display a blank new order screen for a particular order entry queue without having to press the New Order button. This is done using the Auto Open New Order check box located in Maintenance > System > Order Entry Queues.

To add a new order button:

1. Select **New Order** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-86:

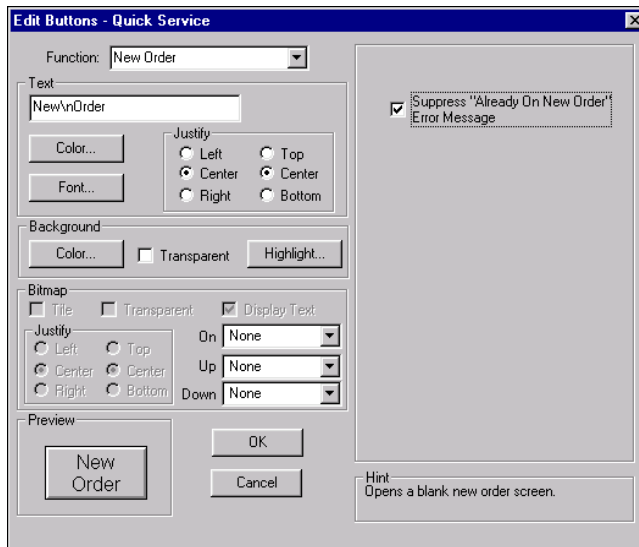


Figure 5-86 New Order Button Function

2. If desired, select **Supress “Already on New Order” Error Message** to eliminate the FOH error message, “You are already on a new order” from displaying when New Order is touched and you are currently on a new order.
3. Click **OK**.

Next Seat

Activates the Sub-Order feature and enables you to divide a single guest check into several orders, each with the appropriate subtotals, taxes, and totals.

To add a Next Seat button:

1. Select **Next Seat** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-88:

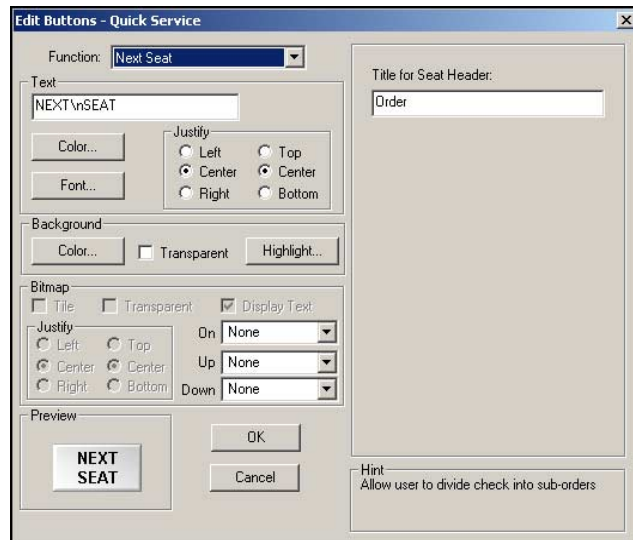


Figure 5-87 Next Seat Button Function

2. Type the **seat header**, such as 'Order', to appear on the guest check window to show a separation between sub-orders.
3. Click **OK**.

Open Drawer

Opens the cash drawer.

Order Item

Adds a menu item to the current order.

To add an order item button:

1. Select **Order Item** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-88:

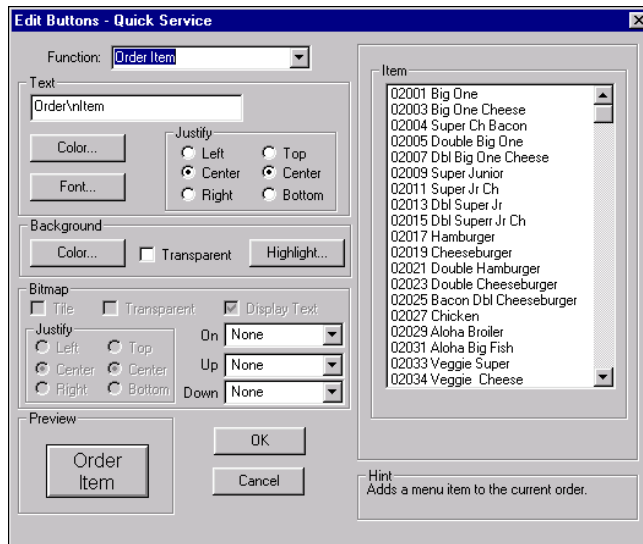


Figure 5-88 Order Item Button Function

2. Select the **menu item** to assign to the button.
3. Click **OK**.

Order Modifier

Adds a modifier item to the current order. This provides modifications to a selected menu item or to the last item ordered. Note: This does not invoke the forced system modifiers activated by the Modify function.

To add an order modifier:

1. Select **Order Modifier** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-89:

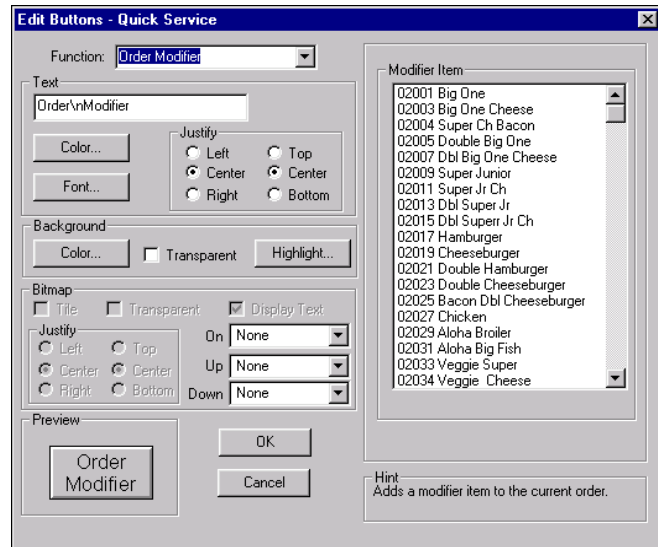


Figure 5-89 Order Modifier Button Function

2. Select the **modifier item** to assign to the button.
3. Click **OK**.



The 'Item' and 'Modifier Item' list boxes use the same items defined in Maintenance > Menu > Items and conform to the pricing hierarchy. You can select an item for both an order item and an order modifier, however you must place an order modifier in a modifier group and the group must be attached to the item it modifies.

Order Type

Specifies the order mode for the current order defined in Maintenance > Menu > Order Modes. You can assign a default order mode to an order queue in Maintenance > System > Order Queues. Assigning this eliminates the need to select the same order type for every transaction.

To add an order type button:

1. Select **Order Type** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-90:

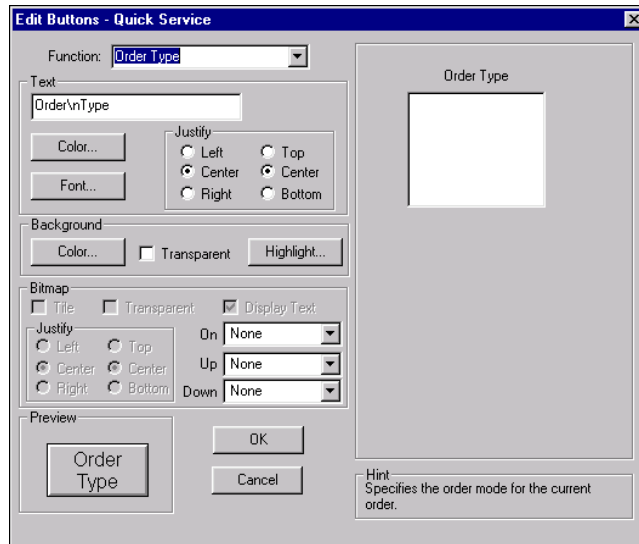


Figure 5-90 Order Type Button Function

2. Select an **order mode** to designate the order type to assign to the button.
3. Click **OK**.

Other Wages

Opens the FOH Other Wages screen to define hours or a dollar amount for such things as vacation time, for the current day.

Play Video

Activates an available .AVI video clip most commonly used for training purposes.

To add a play video button:

1. Select **Play Video** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-91:

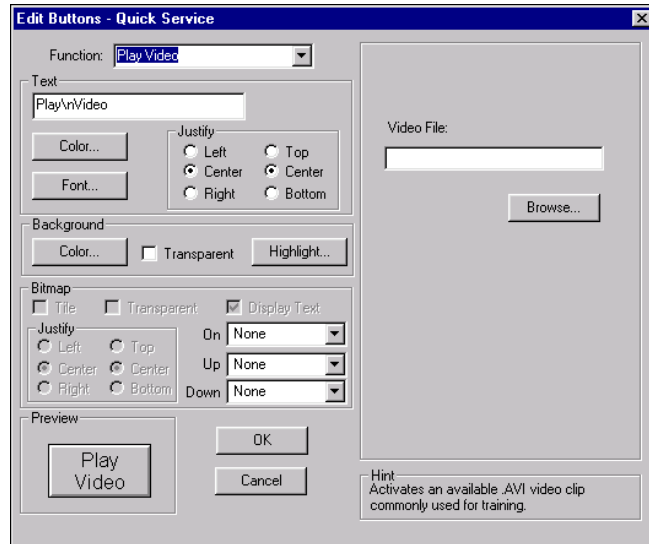


Figure 5-91 Play Video Button Function

2. Enter the **path** for an available .AVI file, or click **Browse** to search the local hard drive for an application.
3. Click **OK**.

PLU List

Opens a FOH numeric keypad for entering an item's ID number, if known, to order.

To add a PLU list button:

1. Select **PLU List** from the **Function** drop-down list. Additional options display, as shown in Figure 5-92:

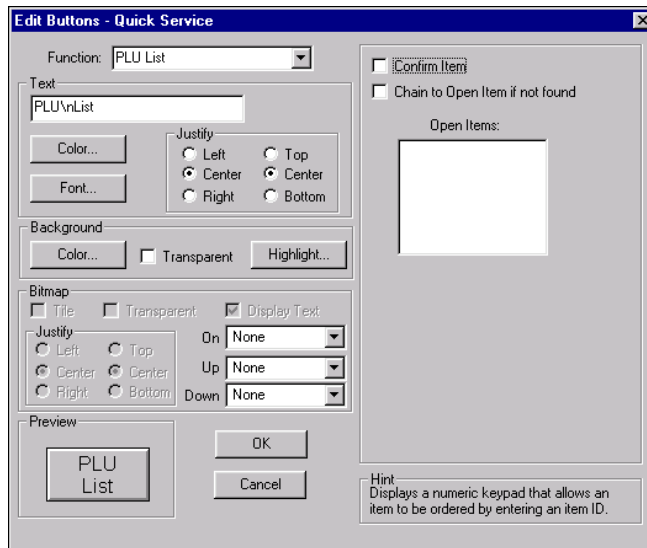


Figure 5-92 PLU List Button Function

2. Select **Confirm Item** to add a FOH confirmation prompt asking if you want to order the item at the specified price.
3. Select **Chain to Open Item if Not Found** to open the FOH Open Item screen for entering a description and a price if the PLU item number is not defined in Maintenance > Menu > Items.
4. Select an **open item** to associate with the PLU list function. This works in conjunction with the 'Chain to Open Item if Not Found' check box and the list box displays with a list of all items that have 'Open Item' selected in Maintenance > Menu > Items.
5. Click **OK**.

PMS Inquire

Enables inquiries about a guest's status to determine information such as whether the guest is registered at the hotel and has the authority to charge orders to his or her room. Used with the PMS Interface product.

Print Checkout

Prints the checkout report.

To add a print checkout button:

1. Select **Print Checkout** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-93:

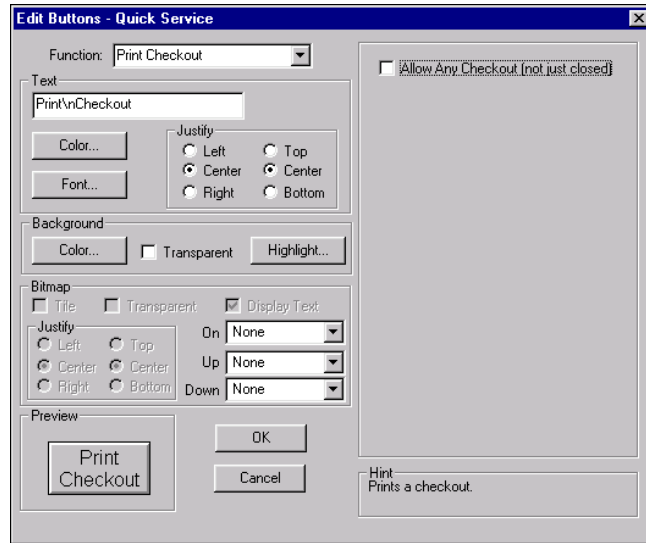


Figure 5-93 Print Checkout Button Function

2. If necessary, select **Allow any Checkout (not just closed)** to print the checkout report for the current employee whether all checks are closed or not.
3. Click **OK**.

Print GST Tax Invoice

Prints the guest check as a GST tax invoice if a GST tax is defined in the system. If the guest check total is less than the amount entered in the Amount text box located in Maintenance > Store Settings > International Group > Taxes subtab, the guest check is automatically reprinted with the title 'Tax Invoice'. If the guest check total is equal to or greater than the amount entered in the

Amount text box, the Special Message screen displays enabling you to enter the customer information to print on the tax invoice.

Print Receipt

Prints a receipt for the current order.

Promo

Applies the specified promotion to the guest check. **Note:** If manager access is required, the system displays a password keypad.

To add a promo button:

- 1. Select **Promo** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-94:

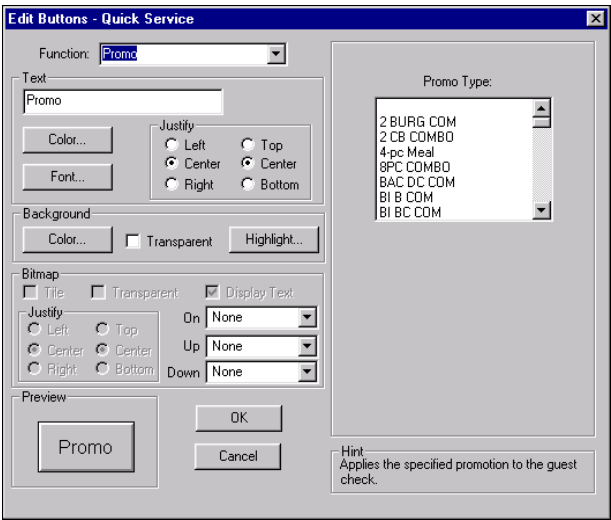


Figure 5-94 Promo Button Function

- 2. Select the **promo** to assign to the button from the **Promo Type** list box.
- 3. Click **OK**.

Promo Lookup

Enables the FOH to select a promo to apply to the guest check. Only promotions that are 'Active', meet the start and end date criteria, and do not have 'Do Not Show in Promo List' selected in the Promotions dialog box display for selection.

Quantity

Applies a multiplier to a selected item or the last item ordered according to the number entered in the 'Quantity' text box.

To add a quantity button:

1. Select **Quantity** from the **Function** drop-down list. Additional options display, as shown in Figure 5-95:

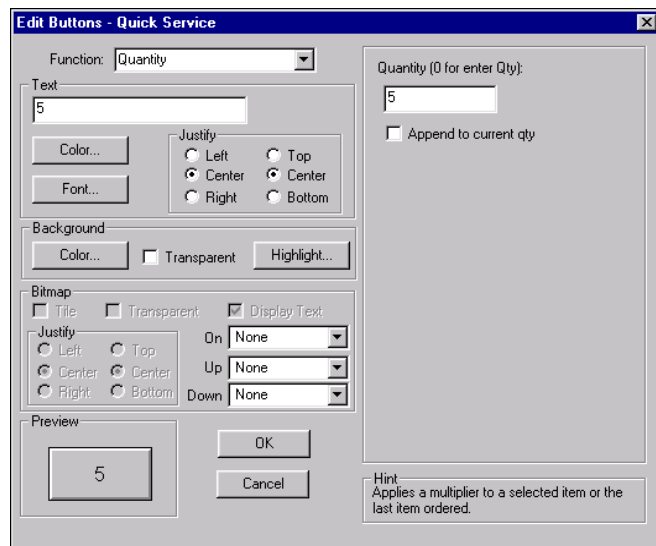


Figure 5-95 Quantity Button Function

2. Enter the **quantity** multiplier for the quantity button in the **Quantity (0 for enter Qty)** text box. If 0 is entered, a FOH numeric keypad opens and prompts for a quantity.



A button must be created for each different quantity.

3. Select **Append to Current Qty** to enhance the function with the ability to select double-digit entries. For example: To ring up 12 burgers, touch 1 and 2.
4. Click **OK**.

Query Cash Card Balance

Queries the remaining balance on a cash card.

Query Gift Card Balance

Enables you to connect with the gift card host and query the remaining balance of a gift card.

Quick Combo

Applies a Quick Combo promotion to the guest check. The Quick Combo is defined in Maintenance > Payments > Promotions.



Refer to the Aloha QuickService Special Features Guide for more information on gift cards.

To add a quick combo button:

1. Select **Quick Combo** from the **Function** drop-down list. Additional options display, as shown in Figure 5-96:

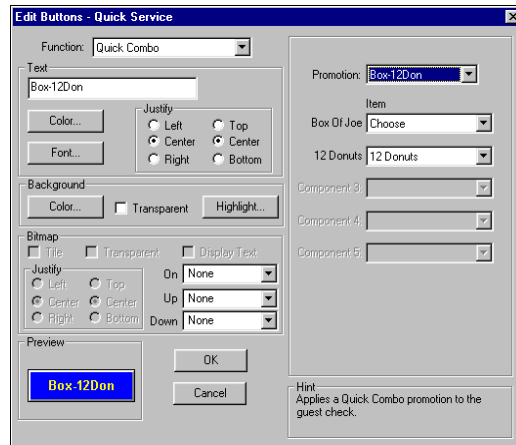


Figure 5-96 Quick Combo Button Function

2. Select the **quick combo promotion** to assign to the button from the **Promotion** list. The components associated with the specific promotion display in the five component drop-down lists.
3. Select the **default item** to order when a guest purchases the Quick Combo. Use this option when the guest does not have a choice, such as a sandwich.

OR

Select the **Choose option**. This option prompts the employee to choose a component, providing the guest a choice, such as fries or chips.



The FOH system dialog box and the buttons on it, are sized according to the number of choices and the size of the Quick Combo button that invokes it.

4. Repeat **step 3** for each component.
5. Click **OK**.

Quick Combo Level

Specifies the level at which the Quick Combo is sold and prepared. Use this for upgrading and down-grading the price and portions of the Quick Combo. For example, an order for medium fries and a medium drink can be upgraded to large fries and a large drink for \$0.39 cents. The button function applies to all Quick Combos and the components for each level is defined in Maintenance > Payments > Promotions.

To add a quick combo level button:

1. Select **Quick Combo** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-97:

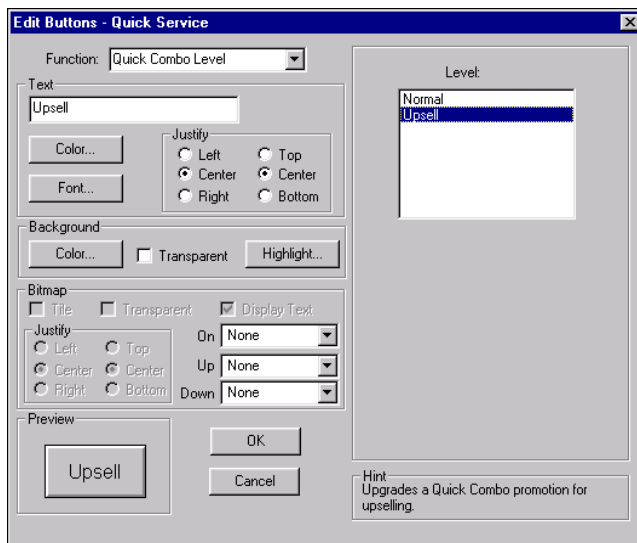


Figure 5-97 Quick Combo Level Button Function

2. Select **ONE** of the following **options**:

Normal — Designates the normal level of upselling a combo. This is for operations where a combo is set up as upsold by default. Normal would be selected for downsizing.

Upsell — Designates the upsell level of upselling a combo.

3. Click **OK**.

Quick Count *

Configures counting options used with the Quick Count.

To add a quick count button:

1. Select **Quick Count** from the **Function** drop-down list. Additional options display, as shown in Figure 5-98:

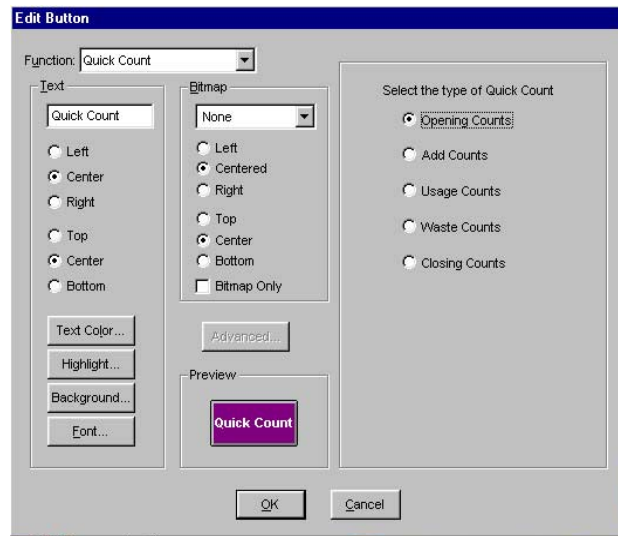


Figure 5-98 Quick Count Button Function

2. Select **ONE** of the following **options**:

Opening Counts — Opens the FOH Open Counts screen with the list of tracking items with 'Open Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.

Add Counts — Opens the FOH Add Counts screen with the list of tracking items with 'Add Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.

Usage Counts — Opens the FOH Usage Counts screen with the list of tracking items with 'Use Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.

Waste Counts — Opens the FOH Waste Counts screen with the list of tracking items with 'Waste Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.

Close Counts — Opens the FOH Close Counts screen with the list of tracking items with 'Close Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.

3. Click **OK**.

Recall

Opens a FOH selection dialog box after a terminal is selected and permits a guest check to be recalled, with authorization.

To add a recall button:

1. Select **Recall** from the **Function** drop-down list. Additional options display, as shown in Figure 5-99:

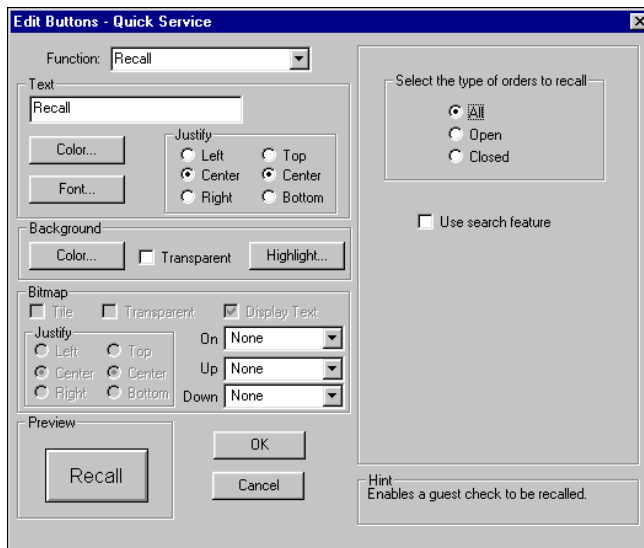


Figure 5-99 Recall Button Function

2. Select **ONE** of the following **options** from the 'Select the Type of Orders to Recall' inset:

All — Recalls all checks, whether they are opened or closed.

Open — Recalls only open checks.

Closed — Recalls only closed checks.

3. If desired, select **Use Search Feature** to open an additional screen to recall a check by entering the first letter(s) of the name or the first number(s) of the check number.
4. Click **OK**.

Recall Next

Recalls the next available order in the specified queue.

Recall Next Open

Recalls the next available open order in the specified queue.

Recall Previous

Recalls the previous available order in the specified queue.

Refund *

Enables the 'refund mode' so a refund can be applied to a guest check. The refund mode orders items in negative entries on a new check. A Close Check function button usually has to be selected to close the check and revert back to positive entries. A refund is performed by opening and ringing up the selected refunded items on a separate check. The entries and subtotal display in negative amounts. Tenders do not read negative amounts so a close check must be performed.

Reopen Check *

Reopens a closed order from a closed order queue.

Repeat

Repeats the selected item(s) on the order.

Report Daily Summary *

Displays the FOH Daily Summary Report.

Report Flash *

Displays the FOH Flash Report, which contains numerous store statistics.

Report PMix *

Displays the FOH report of the day's cumulative sales by menu item.

Report Prep *

Displays a FOH report of tracking items sold for the day and the time frame in which they were sold. This function is used with the Quick Count.

Report Quick Count *

Displays the FOH report according to the tracking information. Each tracking item and composite tracking item with the 'FOH Quick Count Report' check box selected is included in the report. This function is used with the Quick-Count.

Report Restaurant Labor *

Displays the labor costs by employee.

Report Restaurant Sales *

Displays the FOH report on daily sales.

Reroute Display Board *

Opens the Display Board Routing screen and enables the employee to alter display board routing.

To add a reroute display board button:

1. Select **Reroute Display Board** from the **Function** drop-down list. Additional options display, as shown in Figure 5-100:

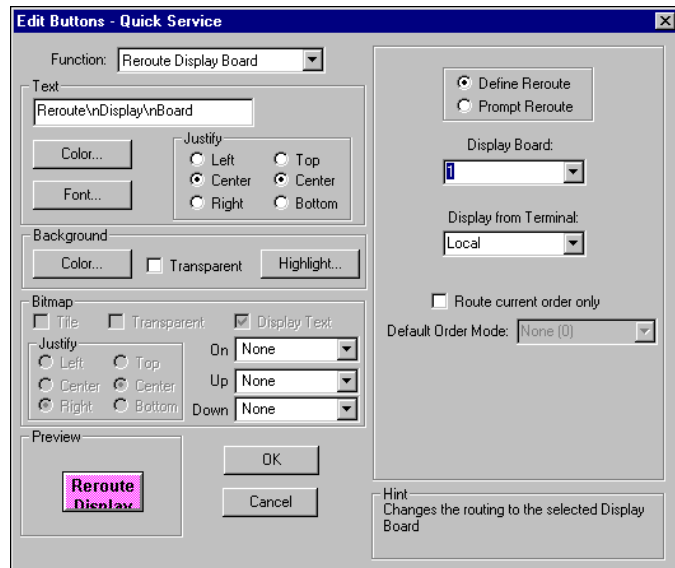


Figure 5-100 Reroute Display Board Function Button

2. Select one of the following options:

Prompt Reroute — Requires the system to display the FOH Display Board Routing screen so you can reroute display boards.

Define Reroute — Allows you to preset a display board routing destination.

3. Select the **display board** to route from the drop-down list, excluding PCD 101s.
4. Select the **terminal** from which the display board displays from the drop-down list.

5. Select **Route Current Order Only** to route only the order currently in use, if desired. When the order is complete, the routing returns to the pre-defined terminal. For example, terminal 1 has permanent control, and terminal 2 invokes temporary control. When terminal 2 completes the order, terminal 1 will regain control. If terminal 1 had an order on it, that order is immediately displayed to the board.
6. Click **OK**.

Reroute Printer *

Opens the FOH Reroute Printers screen and enables the employee to alter printer routing.

Reroute Printer Group *

Opens the FOH Reroute Printer Group screen and enables the employee to alter the routing of a group of printers.

Reroute Video *

Opens the FOH Reroute Video screen, enabling the ability to alter video routing. This function is used with the remote display systems.

Reroute Video Group *

Opens the FOH Reroute Video Group screen, enabling the ability to alter the routing for a group of videos. This function is used with remote display systems.

Review Lock

Locks the displayed order in the review check panel(s). To unlock the order, touch Review Lock again.

Review Next

Displays the next available order displayed in the review check panel for the specified queue.

Review Previous

Recalls the previous available order displayed in the review check panel for the specified queue.

Routing Level *

Opens the FOH Routing Levels screen, providing overall control of where items waiting in a queue route to and from.

To add a routing level button:

1. Select **Routing Level** from the **Function** drop-down list. An additional option displays, as shown in Figure 5-101:

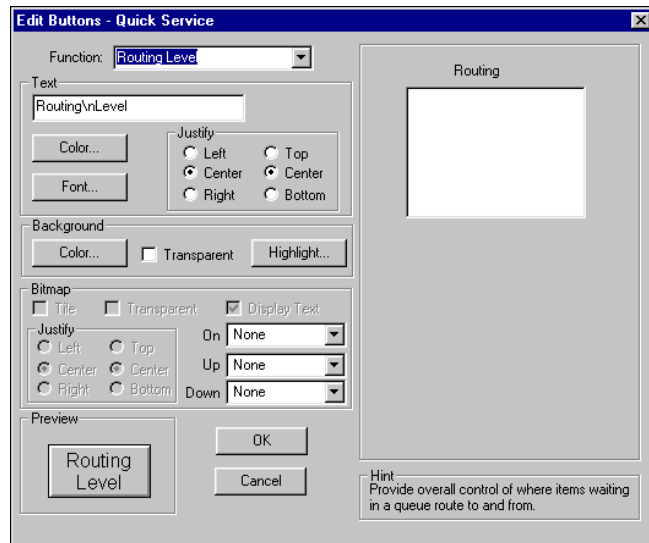


Figure 5-101 Routing Level Function Button

2. Select the **routing level**, as defined in Maintenance > System > Routing Levels.
3. Click **OK**.

Run Application

Enables the use of another application located on the file server. Common applications are Calculator, Microsoft Word®, and Microsoft Excel®.

To add a run application button:

1. Select **Run Application** from the **Function** drop-down list. Additional options display, as shown in Figure 5-102:

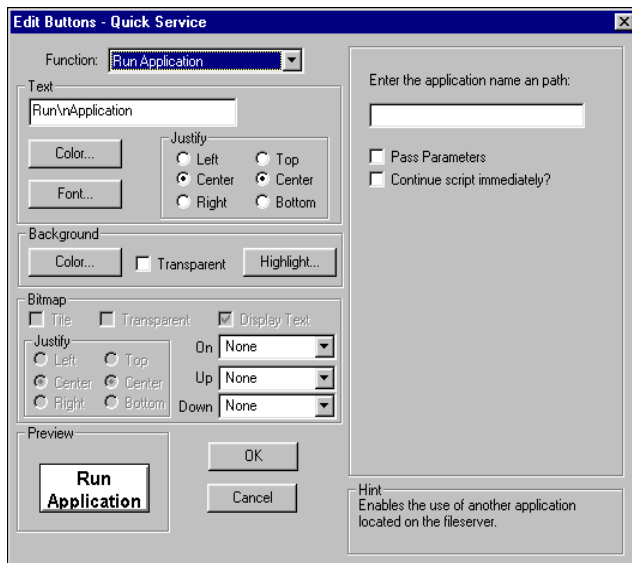


Figure 5-102 Run Application Button Function

2. Enter a unique **name** as the **Text**, or accept the default description of **Run Application**.
3. Define the **path** to the application in **Enter the application name and path**.
4. If desired, select **Pass Parameters** to pass any parameters that might be defined in the command line of the application.
5. If desired, select **Continue Script Immediately** to bypass any error messages the Run Application function might encounter. Use this setting if the system takes too long to locate the external application and holds up the FOH.
6. Click **OK**.

Script

Enables the use of multiple button functions scripted together in one button selection. The example provided is a typical script function for tendering a check.

To create a typical script button:

1. Select **Script** from the **Function** drop-down list. Additional options display, as shown in Figure 5-103:

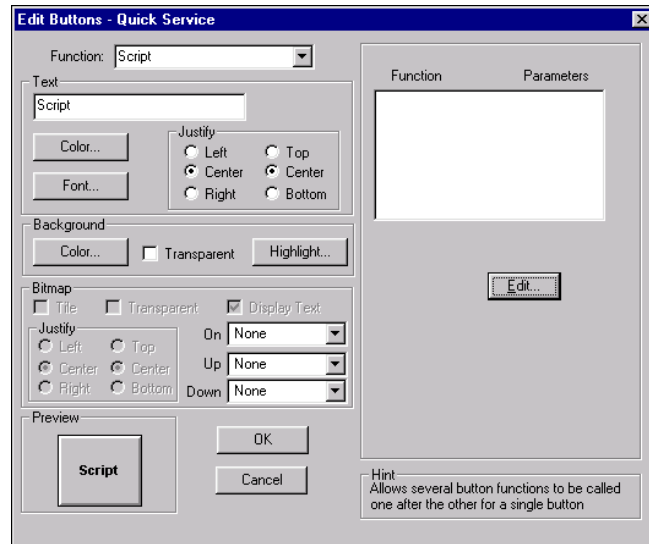


Figure 5-103 Script Button Function

2. Click **Edit**. The Edit Script dialog box displays, as shown in Figure 5-104:

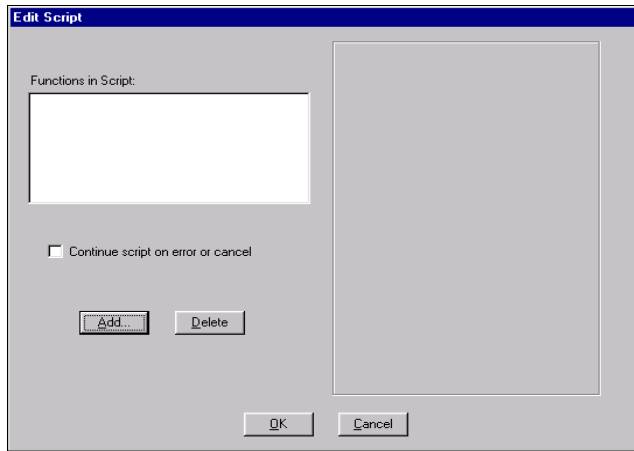


Figure 5-104 Edit Script Dialog Box

3. If necessary, select **Continue Script on Error or Cancel** to enable the script to continue if the selected function fails or asks for a confirmation.
4. Click **Add**. The Select Function dialog box displays, as shown in Figure 5-105:

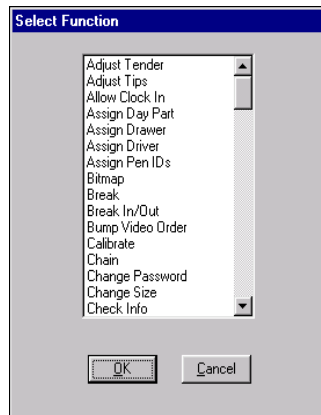


Figure 5-105 Select Function Dialog Box

5. Select **Tender** from the list box and click **OK**. The Edit Script dialog box returns with the function displayed in the **Functions in Script** list box and the attributes displayed on the right, as shown in Figure 5-106:

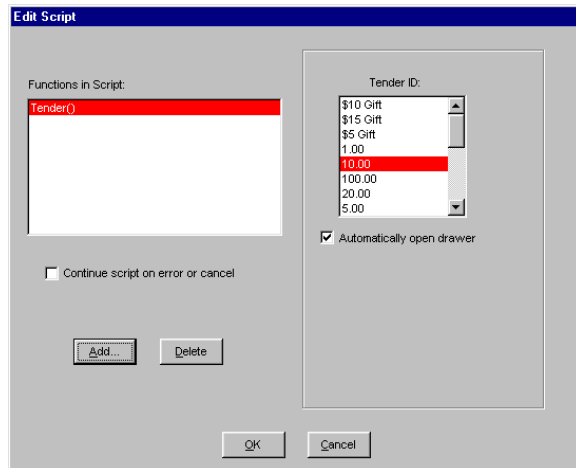


Figure 5-106 Edit Script (Tender Function)

Display the functions to perform in the order in which they are entered. It is important that they follow a logical procedure to perform correctly. For example, a check cannot be closed if the close function is defined before a tender function.

Parameters — Displays in parenthesis after the function in the **Functions in Script** list box. The digit(s) before the comma designate the ID number for the record, as defined in its respective function, if applicable. The digit(s) after the comma designate additional selections made in the Edit Script dialog box for the selected function.

6. Repeat **steps 3 through 5**, using button functions other than Tender, until the script is complete. Typically a tender script includes a 'Close Check' and 'Chain' function.

7. Click **OK** to return to complete the script and return to the Edit Button dialog box with the completed script, as shown in Figure 5-107:

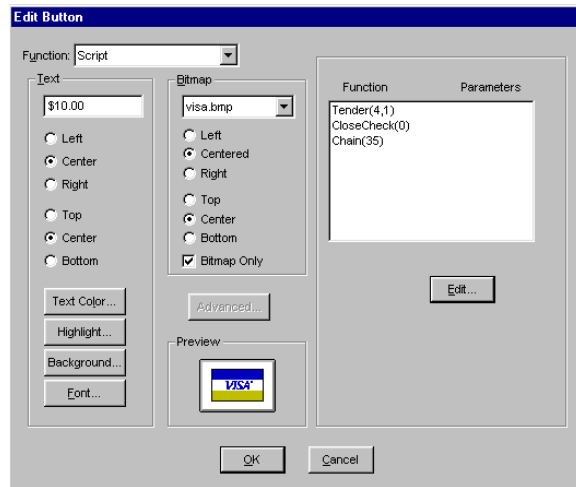


Figure 5-107 Complete Script Button Function

8. Click **OK**.

Send

Sends the current order to the kitchen with an order mode.

Self Assign Delivery Order

Opens the FOH Delivery Orders screen and enables the employee to assign delivery orders, if the 'Delivery' and 'Self Assign Orders' check boxes are selected for the job code. This function is used with the Delivery/Frequent Buyer.

Server Sales *

Displays the FOH Server Sales Report.

To add a server sales button:

1. Select **Server Sales** from the **Function** drop-down list. Additional options display, as shown in Figure 5-97:

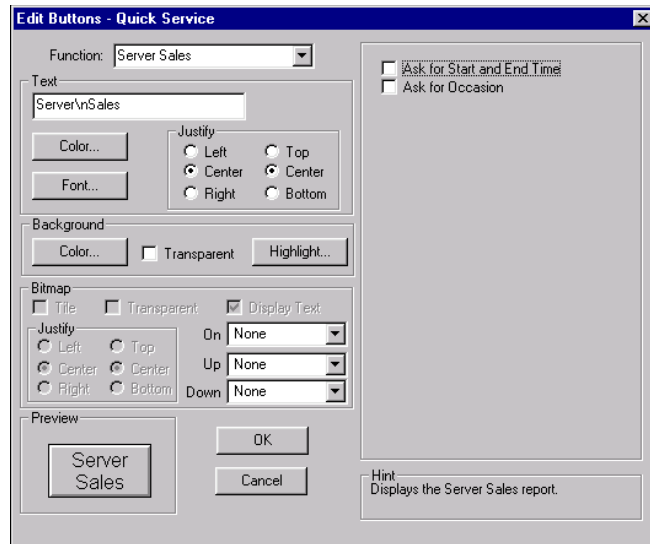


Figure 5-108 Server Sales Function Button

2. If desired, select **Ask for Start and End Time** to open the FOH Select Start Time screen and define a specific time for the Server Sales report to run.
3. If desired, select **Select Ask for Occasion** to enable the employee to choose an occasion. This is only applicable if the SuperSite is in use.
4. Click **OK**.

Shutdown Term *

Shuts down terminals running Windows and passes through the Windows shutdown screen. This avoids corruption of the terminals.

Sign In/Out Driver

Signs a driver in or out on delivery runs, if the Delivery/Frequent Buyer is in use.

Smart Select and Smart Item

The Smart Select and Smart Item button functions work together to create a panel containing items which are sold by size, without having to add each item to the panel. This enables smaller, less confusing panels to be created. For example, let's say your Items database contains the following soft drink items:

Small Coke	Small Dr. Pepper
Medium Code	Medium Dr. Pepper
Large Coke	Large Dr. Pepper
Kids Coke	Kids Dr. Pepper
Small Diet Coke	Small Sprite
Medium Diet Coke	Medium Sprite
Large Diet Coke	Large Sprite
Kids Diet Coke	Kids Sprite

Without Smart Select and Smart Item, 16 buttons are required on the Beverages panel to accommodate these soft drinks. With Smart Select and Smart Item, only eight buttons are required, as shown in Figure 5-109:



Figure 5-109 Sample FOH Smart Item and Smart Select

For each new beverage, only one more button is required, therefore, the larger the variety of soft drinks that are offered, the more beneficial this feature becomes. The Smart Select button function defines the assorted sizes in the group. Smart Item specifies the items associated with each beverage button, and designates the default size to order if the Smart Select button is not selected first. When a beverage is ordered in the FOH, touch the size button,

then touch the desired drink. If you do not touch a size button first, the size established as the default is ordered.



Place Smart Selects and Smart Items with the same Smart Group number on the same panel.

The following setup depicts the requirements to create Smart Selects for the Beverage Sizes Smart Group, as shown in Figure 5-110:

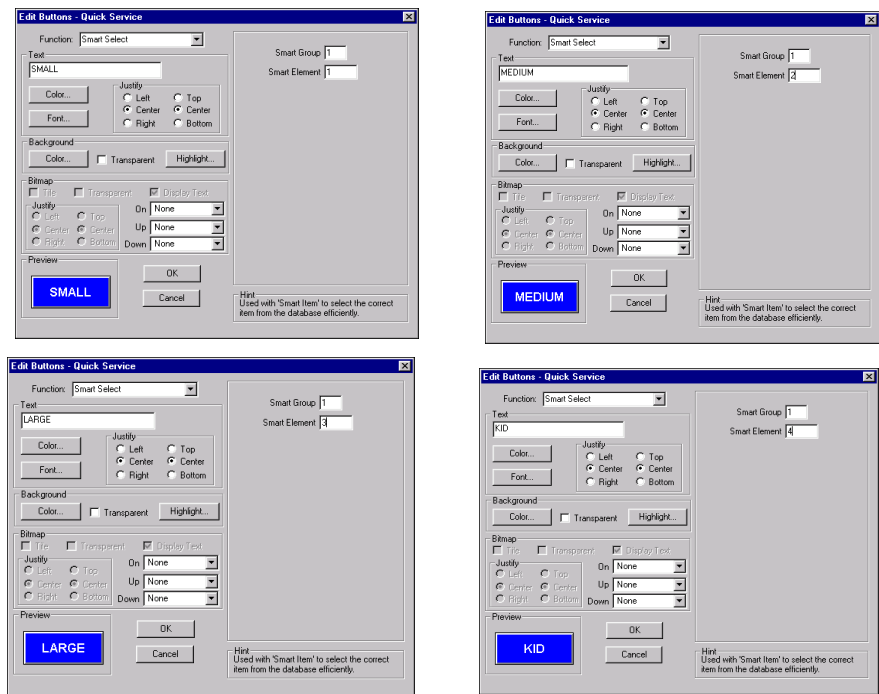


Figure 5-110 Smart Select Configuration

The following setup depicts the requirements to create a Smart Item for a

Coke button, as shown in Figure 5-111:

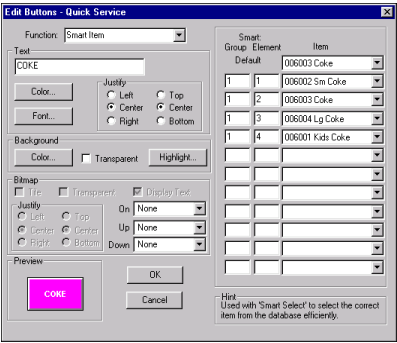


Figure 5-111 Smart Item Configuration



The Smart Select and Smart Item button functions are discussed in the order required for setup, not the order in which they display in the list.

Smart Select

Designates the ‘Smart Group’ and ‘Smart Element’ associated with a Smart Item.

To add a smart select button:

1. Select **Smart Select** from the **Function** drop-down list. Additional options display, as shown in Figure 5-112:

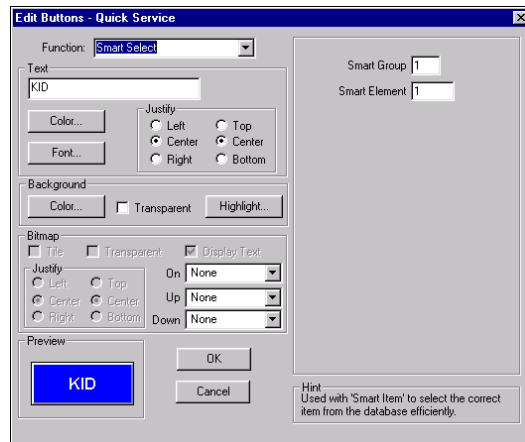


Figure 5-112 Smart Select Button Function

2. Enter the **smart group number** in association with the smart item function buttons. A group could refer to beverage sizes or French Fry sizes. Small menus usually have very few Smart Groups.
3. Enter the **smart element** in association with the smart item function buttons. A smart element could refer to sizes, fluid levels, and more. Small, medium, large, and mega are all smart elements. Each time the smart item is ordered, the smart element is cleared to zero when another button is touched.
4. Click **OK**.

Smart Item

Defines an order item based on the Smart Select group and element, thereby, reducing the number of buttons on a panel. This accommodates items sold at various sizes, measurements, and prices, such as small, medium, and large.

To add a smart item button:

1. Select **Smart Item** from the **Functions** drop-down list. Additional options display, as shown in Figure 5-113:

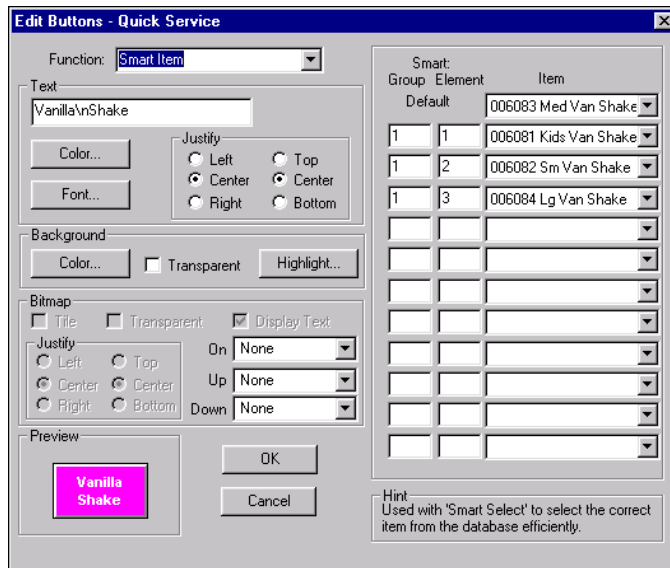


Figure 5-113 Smart Item Button Function

2. Select the **smart group**, as defined in the associated Smart Select button function.
3. Select the **smart element** to designate the corresponding 'Smart Element', as defined in the Smart Select button function. For example, Item 9080 - Small Coke corresponds to the Smart Element 1 - Small.
4. Select the **smart item** to designate the item to associate with the Smart Group and Smart Element. You must create an item for each variation in Maintenance > Menu > Items and placed in their respective order in the drop-down lists. For example, the employee touches a FOH Large Smart Select button, then a Coke smart item button to ring up a large Coke. Note: This behaves the same way as a 'Shift key' function common in the POS industry.
5. Select **Default Item** to designate the default Smart Item selection when a Smart Select button is not chosen first in the FOH. Ex. If a medium size is selected as the default french fry size, the employee

touches the French Fry Smart Item button without a preceding Smart Select function button.

6. Click **OK**.

Store

Adds the current order to the end of the queue. It would be used in a drive-thru environment where the order is stored but not yet closed.

Tax Exempt

Opens the FOH Tax Exempt screen to enter a tax exempt number.

Tender

Applies a specified tender to the guest check.

To add a tender button:

1. Select **Tender** from the **Function** drop-down list. Additional options display, as shown in Figure 5-114:

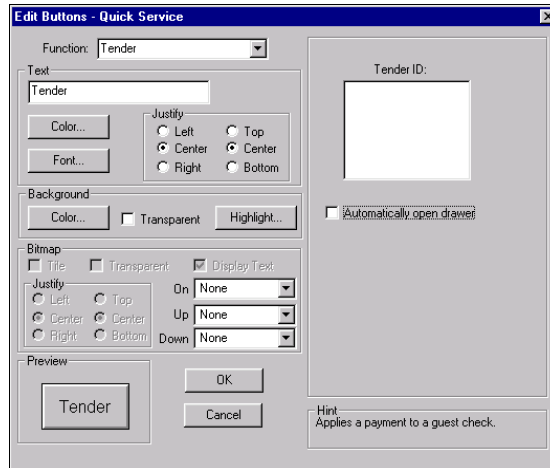


Figure 5-114 Tender Button Function

2. Select the **tender** to apply to the guest check from the **Tender ID** list box. Tenders are defined in Maintenance > Payments > Tenders.

3. If desired, select **Automatically Open Drawer** to open the cash drawer when the tender is selected. The check box on the Maintenance > Store Settings > Security > Cash Drawer subtab overrides all tender buttons with this setting.
4. Click **OK**.

Unassigned

Designates there is no function assigned to this button. This is the default button function and is most often used as a panel heading or for future menu expansion.

Volume Level *

Enables the employee to change the Volume Level. This meets scenarios where management can alert the kitchen for preparation time when large unexpected parties arrive. It is also useful for locations in, or around, movie theatres.



This function is used with remote display systems.

To add a volume level button:

1. Select **Volume Level** from the **Functions** drop-down list. An additional option displays, as shown in Figure 5-115:

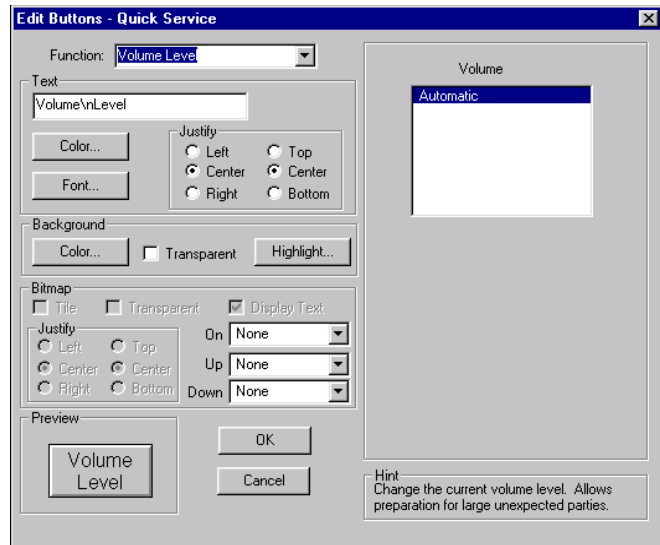



Figure 5-115 Volume Level Button Function

2. Select the **volume level** from the **Volume** list box. Volume Levels are defined in Maintenance > System > Volume Level.
3. Click **OK**.

Screen Editor

Once you complete the creation of panels and their buttons, use Screen Editor to combine panels and save them as ‘home screens’ — the main screen that each employee sees when logging in. Create as many screens as necessary and then assign them to specific job codes.

Select Maintenance > Menu > Screen Editor to display the Screen Editor function tab, as shown in Figure 5-116:

 Refer to Chapter 4, Labor Maintenance Functions, for more information about Job Codes.

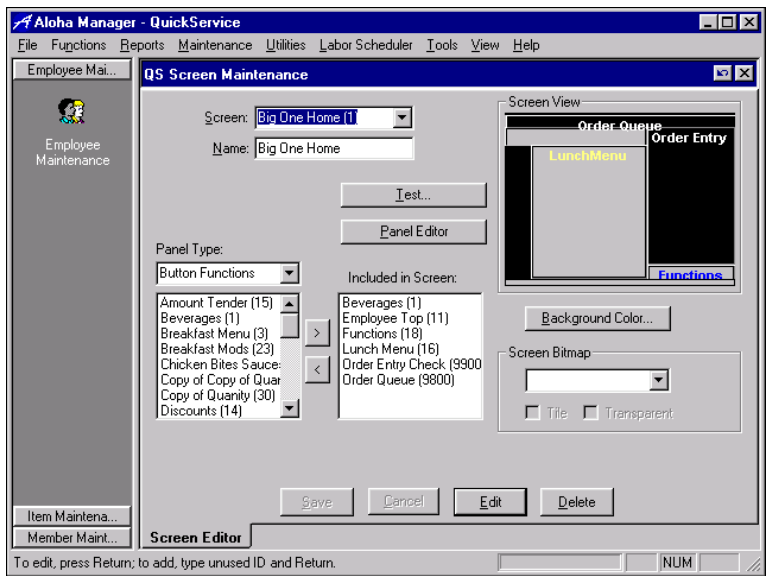


Figure 5-116 Screen Editor Function Tab

Screen — Holds a two-digit number that together with ‘Name’ uniquely identifies the order entry screen. To create a new screen, enter an unused number and press Enter. To edit an existing screen, select it from the drop-down list, and press Enter.

Name — Identifies the purpose of the home screen, such as Drive Thru or Counter.

Test Button

Click Test to display the complete home screen as it will appear in the FOH. To exit the Test screen, click the right mouse button and select End Test.

Panel Editor Button

Click Panel Editor to open the Panel Editor function.

Panel Type and Included on Screen — The ‘Panel Type’ and ‘Included in Screen’ selection lists are used to define the panels to display on the screen. The ‘Panel Type’ list contains a list of the available panels as defined in Maintenance > Menu > Panel Editor. The ‘Included in Screen’ list contains the panels currently selected to display on the screen.

To include a panel in the screen:

1. Select the panel type from the ‘Panel Type’ drop-down list. All panels defined for the selected type, display in the left list box.
2. Click the panel and then click >. The panel is moved to the ‘Included in Screen’ list box. To add more than one panel at a time, hold down Shift to select consecutive panels or Ctrl to select non-consecutive panels, and use the mouse to select multiple panels in the ‘Panel Type’ list box.

To remove a panel from the screen:

1. Select the panel type from the ‘Panel Type’ drop-down list. All panels defined for the type displays in the left list box.
2. Click the panel and then click <. The panel is removed from the ‘Included in Screen’ list box. To remove more than one panel at a time, hold down Shift to select consecutive panels or Ctrl to select non-consecutive panels, and use the mouse to select multiple panels in the ‘Panel Type’ list box.

Background Color Button

Click BackGround button to display the color palette and define the background color of the screen.

Screen Bitmap Inset

Screen Bitmap — Select the bitmap to display as the background of the screen.

Tile — Displays the background bitmap in a tile pattern.

Transparent — Displays the background bitmap as transparent.



Refer to Flex Taxes in this chapter for more information on setting up conditional taxes.

Taxes

The Aloha system can meet the needs of virtually any taxing jurisdiction. Taxes can be calculated using a flat rate or tax breakpoints can be set up and utilized in a tax table. You also have the ability to define taxes for use with items that require conditional taxation when purchased in a variety of circumstances. For example, it is possible to charge no tax on a soft drink when it is ordered individually, and charge tax on it when it is ordered with food. In addition, you can identify a tax as a Goods and Services Tax (GST), which taxes every item on a guest check unless it is defined as an exempt item. You can define up to 999 taxes.



The information contained here regarding taxes is intended solely as a guide for use with Aloha software. Consult state and federal regulations regarding the collecting and reporting of all taxes by your establishment.

Tax Subtab

Use the Tax subtab to establish such things as the name of the tax, the tax rate, and type of tax. You also set the minimum amount to apply to a check before a tax is applied, and whether the tax is a secondary or GST tax. Select Mainte-

nance > Menu > Taxes to display the Taxes function tab, as shown in Figure 5-117:

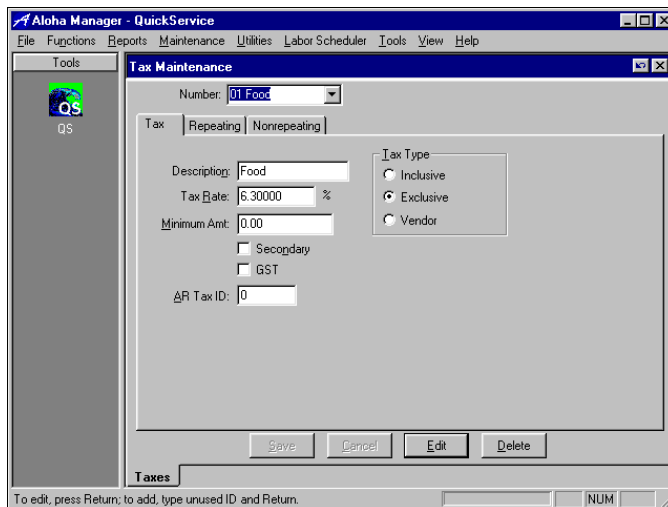


Figure 5-117 Taxes Subtab

Tax ID — Holds a two-digit number that together with 'Description' uniquely identifies each Tax ID record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Tax ID drop-down list, select the record to edit and press Enter.

Description — Displays a short descriptive name that identifies the tax record.

Tax Rate — Designates the tax rate the system uses to calculate the tax amount. The 'Tax Rate' is used to calculate taxes using a flat-rate multiplier. It cannot be used for jurisdictions that require use of a tax table instead of calculations. The system calculates taxes for the defined record using the value placed in this field if all elements in the 'Non-repeating Breakpoints' and 'Repeating Breakpoints' arrays are set to zero.

Minimum Amt — Designates the minimum sale amount required before a tax is applied. The tax is not applied until the guest check total is more than the amount entered here. This is used in certain tax jurisdictions, such as a Canadian province.

Secondary — Defines the tax method as a secondary tax that is used in conjunction with another tax method. It is required for some types of menu items in certain jurisdictions. Secondary taxes must be exclusive.

GST — Defines the tax method as a Goods and Services tax (GST). Refer to the section on GST Taxes in this chapter for more information on the GST.

AR Tax ID — Interfaces with the Aloha Accounts Receivable product. There are eight tax rate text boxes located on the General tab in Accounts Receivable. These are labeled 'POS Tax Rate 1' through 'POS Tax Rate 8'. Enter the number, between 1 and 8, for the 'POS Tax Rate' text box that corresponds with this tax record.

Tax Type Inset

Inclusive — Calculated as part of the menu price. Inclusive taxes are included in the stated price of the menu item. Inclusive tax methods are typically used for alcoholic beverages.

Exclusive — Added to the price of the item. Exclusive taxes are over and above the stated price of the menu item. Exclusive tax methods are common for food.

Vendor — Indicates a special tax required in certain jurisdictions. This should be set if the primary tax method is a vendor tax.

To set up a basic primary sales tax record:

1. Enter an unused two-digit number and press **Enter**.
2. Type a short description of the type of tax record you are creating in the **Description** text box.
3. Select the appropriate **Tax Type**.
4. Type the numeric value (in decimals) of the tax rate you will use for this type of tax in the **Tax Rate** text box.

5. Enter the minimum sale amount required before a tax is applied in the **Minimum Amount** text box. You may acquire this figure from the tax tables you use to collect tax on sales at your establishment.
6. Select the appropriate check boxes to identify **Secondary** or **GST** taxes. If you select **Secondary**, the **Exclusive** box is automatically selected in the system. If you select **GST**, proceed to additional instructions for configuring inclusive and exclusive GST taxes later in this chapter. If you need to set up breakpoints, refer to the next section on non-repeating and repeating breakpoints.



Secondary taxes must be set as exclusive taxes.

7. Click **Save** and **exit** the function.
8. Select Maintenance > Menu > Items to associate the new primary tax rate with each item to which it will apply.

Repeating Subtab

Use the Repeating subtab for jurisdictions that use tables to calculate taxes rather than a straight tax rate. Non-zero values placed in the tables override the value set in 'Tax Rate'. If taxes are calculated using a tax rate, the values in

'Repeating Breakpoints' should be set to zero. Select Repeating to display the Repeating subtab, as shown in Figure 5-118:

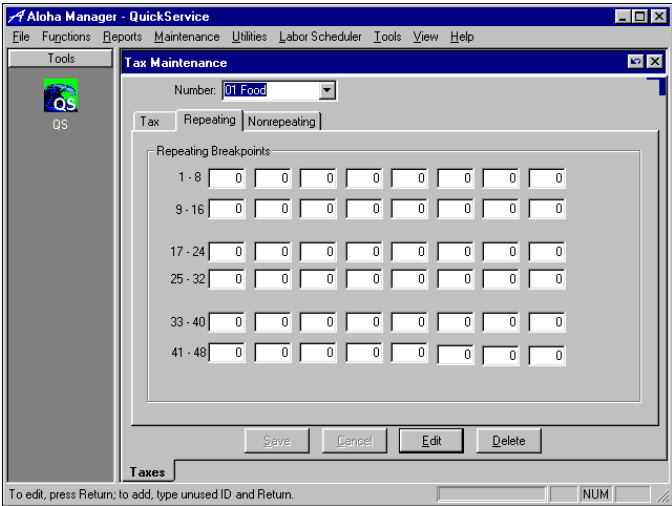


Figure 5-118 Repeating Subtab

Nonrepeating Subtab

Use the Nonrepeating subtab to establish irregular intervals. To set the non-repeating breakpoints, enter whole number values into the boxes beginning from the upper left and reading across the screen. The values entered represent one-cent intervals beginning at zero and counting up. The value in the first box represents the number of one-cent intervals that have no tax. For example, if the first box contains a 7, then sales from 0.00 to 0.06 cents have no tax. The second box holds the number of one-cent intervals with 0.01-cent tax applied: a 12 in the second box means that sales from 0.07 cents to 0.18 cents have a 0.01-cent tax applied. The third box holds the number of one-cent intervals with 0.02-cents tax applied: a 12 in the third box means that sales from 0.19 cents to 0.30 cents are subject to a 2-cent tax.

Select Nonrepeating to display the Nonrepeating subtab, as shown in Figure 5-119:

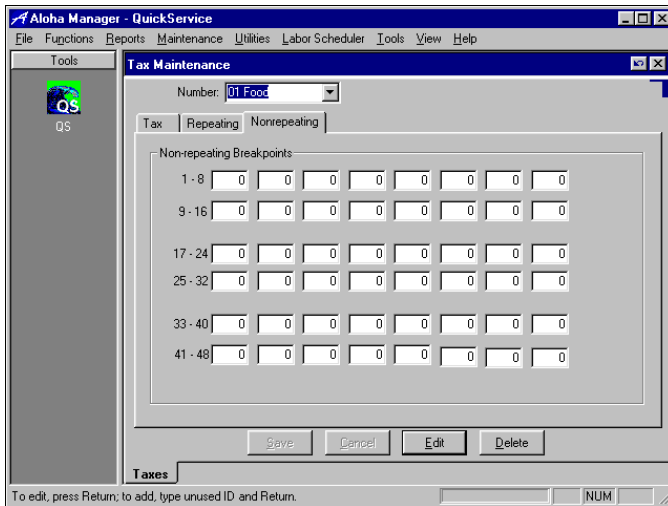


Figure 5-119 Nonrepeating Subtab

The system uses the values in 'Non-repeating Breakpoints' until it reaches a zero value. It then uses the values in the 'Repeating Breakpoints' table. Values are entered as in the 'Non-repeating Breakpoints' table; however, the calculations begin at the last value entered in 'Non-Repeating Breakpoints' rather than at zero.

Sufficient breakpoint values should be entered in 'Repeating Breakpoints' until a pattern is established. Tax methods are assigned to each item record, and before calculating taxes for a guest check, the system calculates a total for items assigned to the same tax methods and calculates the tax on the check for each tax type. This ensures that items with different tax methods are taxed at the proper rate, even when mixed together on a guest check.

To set up repeating and non-repeating tax tables:

1. Enter the correct **Tax Rate** in the appropriate box at the top of the Taxes function tab.
2. Locate the **Non-Repeating Breakpoints** section. Begin with the box in the top left corner. Enter the first amount that will be taxed.

3. Place the first amount where the tax will be applied in the first box of the Non-Repeating Breakpoints section (first number listed in the Amount of Sale column, Figure 5-120.) The first breakpoint is \$0.10, because that is the lowest amount where a sales tax will be charged. The second breakpoint is determined by subtracting the lowest amount from the highest amount within that tax range ($14 - 10 = 4$).
4. Enter the second breakpoint in the box to the right and continue entries horizontally until you reach the end of the first row. Then begin the second row in the far left corner and continue across in a horizontal manner.
5. Once you establish the first two breakpoints, subtract the highest amount in the previous tax range from the highest amount in the next tax range ($44 - 29 = 15$).
6. Continue this formula until you reach the first 'repeating breakpoint'.

An example is displayed in the table, as shown in Figure 5-120:

Amount of Sale		Tax	Breakpoint
.10	.14	.01	10
.15	.29	.02	4
.30	.44	.03	15
.45	.59	.04	15
.60	.74	.05	15
.75	.88	.05	14
.89	1.03	.07	15
1.04	1.18	.08	15
1.19	1.33	.09	15
1.34	1.48	.10	15
1.49	1.62	.11	14
1.63	1.77	.12	15
1.78	1.92	.13	15
1.93	2.07	.14	15
2.08	2.22	.15	15
2.23	2.37	.16	15
2.38	2.51	.17	14
2.52	2.66	.18	15
2.67	2.81	.19	15
2.82	2.96	.20	15
2.97	3.11	.21	15
3.12	3.25	.22	14
3.26	3.40	.23	15
3.41	3.55	.24	15
3.56	3.70	.25	15
3.71	3.85	.26	15
3.86	4.09	.27	24
4.10	4.14	.28	5
4.15	4.29	.29	15

Figure 5-120 Tax Breakpoint Table

7. Once you establish the first repeating breakpoint, enter the numbers in the bottom section of the Taxes function tab (Figure 5-117), **Repeating Breakpoints**. Figure 5-117 shows the first repeating breakpoint at \$4.10 - \$4.14 (the \$0.10 and \$0.14 are the same as the first taxable amounts).

If the sample table were a complete Tax Bracket Table, it would continue to \$20.00, where the tax would be \$1.35 (based on 6.75%).

GST Taxes

The Goods and Services Tax (GST) taxes every item on a guest check, unless you have specifically exempted an item.



The information contained here regarding taxes is intended solely as a guide for use with Aloha software. Consult state and federal regulations regarding the collecting and reporting of all taxes by your establishment.

As with any tax created in Aloha, you must first set up a basic tax record in Maintenance > Menu > Taxes (Figure 5-117) before you configure it as a GST tax. Use the procedures outlined earlier in this chapter on how to set up a basic primary sales tax record. Unlike primary taxes set up in Aloha, it is not necessary to attach a GST tax to each item.

Select Maintenance > Store Settings > International group to access the GST subtab shown in Figure 5-121:

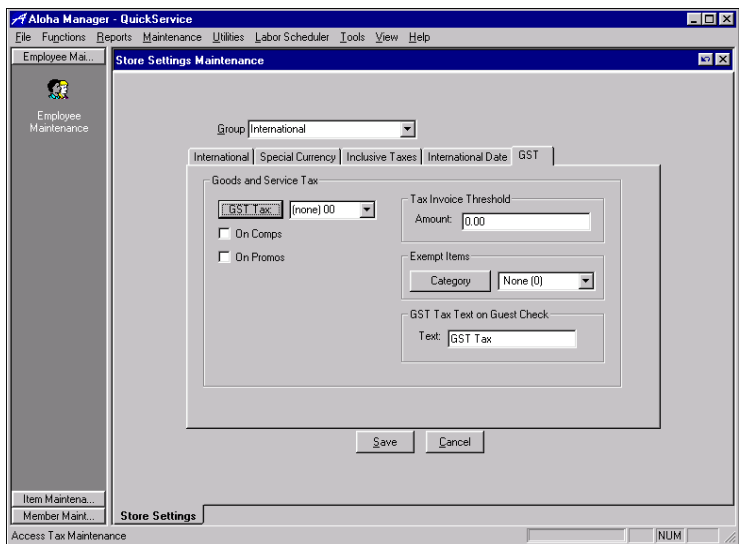


Figure 5-121 GST Subtab

GST Tax Button

Click GST tax to access the Taxes function tab and add or edit an existing primary tax record. All taxes with ‘GST’ selected in the Taxes function tab display in the drop-down list.



Canadian GST taxes are unique to Canada and are best configured in the flex tax module rather than the GST module.

GST Tax — Specifies the primary tax record to be defined as a GST tax.

On Comps — Enables you to apply the GST to the full price of a comp. If the GST is set as inclusive, the system selects this check box and disables it. If you change the GST tax to exclusive, the check box becomes enabled, but it remains selected, therefore, retaining a value of TRUE. You must clear the check box to apply the GST tax to the reduced amount of the comps.



Refer to the
'Print a Tax
Invoice' section in this
chapter for more informa-
tion

On Promos — Enables you to apply the GST to the full price of a promo. If the GST is set as inclusive, the system selects this check box and disables it. If you change the GST tax to exclusive, the check box becomes enabled, but it remains selected, therefore, retaining a value of TRUE. You must clear the check box to apply the GST tax to the reduced amount of the promo.

Tax Invoice Threshold Inset

Amount — Represents the dollar amount of the invoice threshold which determines printing parameters for the tax invoice. This is a seven-digit number with a default value of zero. For example, if the threshold is set at \$50.00, then when a guest check totals \$50.00 or more, a prompt displays enabling text to be entered. This text prints on the guest check

Exempt Items Inset

The Exempt Items inset enables you to identify a specific category for which you want the items to be exempted from the GST tax.

Category Button

Click Category to access the Categories function tab to add or edit a category. Changing a category changes it for all items assigned to it.

Category — Specifies the category in which to assign exempt GST tax status. All existing categories display in the drop-down list. The default value is None, which applies the GST to all items on the guest check.

GST Tax Text on Guest Check Inset

Text: — Enables you to define what prints on the GST line on the guest check. The default text is GST Tax. This is a 20-character field.

GST Inclusive Taxes

If you define the GST tax as an inclusive tax, the tax is included in each item price, hereafter referred to as the *full item price*. Item prices should be set up in Item Maintenance with a price that includes tax as well as the value of the item. The GST tax is applied to every item on the guest check.

The formula the system uses to calculate the GST inclusive rate is: (amount*rate) / (1 + all percentage rates added together excluding the GST tax rate).



If the GST tax is set as inclusive, the primary taxes must be set as inclusive also or the rates are ignored by the system.

To configure a GST inclusive tax:

1. Set up a basic tax record according to procedures cited earlier in this chapter. Select the **GST** and **Inclusive** text boxes. Click **Save** and **Exit** to the main menu.
2. Select **Maintenance > Store Settings > International** group. The **International** subtab displays as the default subtab.
3. Select the **Inclusive Taxes** subtab. The Inclusive Taxes subtab displays, as shown in Figure 5-122:

Figure 5-122 Inclusive Taxes Subtab

4. To print detail for inclusive taxes, select **Do Not Print Subtotal and Tax on Check**. Otherwise, only the subtotal and tax will print.
5. Select **Use Inclusive Tax Breakout**.
6. Enter text in the **Pre Text**, **Tax Text**, and **Base Text** text boxes. In the example in Figure 5-123, text was entered as follows: **Pre Text** =

Inclusive Tax:, **Tax Text** = *Amt.*, and **Base Text** = *Tax.*. The entries made here display on the guest check, as shown in the sample guest check in Figure 5-123:

Item	250.00
Item	350.00
Item	400.00
Total	1000.00
Total Includes:	
Additional Charge	87.47
Inclusive Tax:	
1% Amt: 970.87	Tax: 8.75
GST Tax:	
3% Amt: 1000.00	Tax 29.13

Figure 5-123 GST Guest Check with Use Inclusive Breakout

If the GST tax is inclusive and the **Use Inclusive Tax Breakout** is cleared, the guest check appears as shown in Figure 5-124:

Item	250.00
Item	350.00
Item	400.00
Sub Total	1000.00
Total	1000.00
Total Includes:	
Additional Charge:	87.47
GST Tax:	29.13

Figure 5-124 GST Guest Check with Use Inclusive Breakout Cleared

If the tax breakout is not desired at the bottom of the guest check, do not fill in the three text boxes and select **Do Not Print Tax Breakout on Check**.

7. Select the **GST** subtab (Figure 5-121).
8. Select the GST tax record from the **Taxes** drop-down list.
9. Enter the dollar amount for the **Tax Invoice Threshold** in your jurisdiction.
10. Select an exempt item category for which there should not be a GST tax collected, if applicable, from the **Category** drop-down list.
11. Enter the text to display on the guest check preceding the GST tax amount in **GST Tax Text on Guest Check**.
12. Click **Save**.



Unlike a primary tax, a GST tax is not attached to an item. When a tax is defined as a GST, it is no longer available on the tax drop-down list in Item Maintenance.

Additional Charges

When you select ‘Use Additional Charge’ from Maintenance > Store Settings > Financials > Add Charges, the system checks for an inclusive GST tax. If one is used, the system selects and disables both the ‘On Comps’ and ‘On Promos’ text boxes and adds additional charges to the *full item prices*. In addition, the system disables the ‘Amount’ text box so a flat rate cannot be used for the additional charge.

Comps and Promos

Comps and promos are taxed at their *full item prices* when the GST inclusive tax is applied.



A primary tax on comps or promos can be defined so that either your establishment or your customer pays the tax. However, a GST tax is always paid by the customer.

Secondary Taxes

Secondary taxes cannot be used with an inclusive tax because secondary taxes are exclusive by nature and cannot be calculated by the inclusive tax formula. The system checks for secondary taxes, and if found, ignores them when calculating inclusive GST taxes.

Surcharges and Order Mode Charges

Surcharges and order mode charges cannot be used with an inclusive GST tax because they are both applied on an item-by-item basis and cannot be calculated by the inclusive tax formula. The system checks for surcharges and order mode charges, and if found, ignores them when calculating inclusive GST taxes.

Verify Data

If you use a primary tax and an inclusive GST tax, select Utilities > Verify Data to ensure:

- You have set all primary taxes as inclusive. If you have not, you receive a warning that 'Item Name Tax ID # must be inclusive when using inclusive GST.'
- The tax is not associated with any item. Errors are reported in Verify Data.
- Additional charges are not configured with a flat rate charge. Errors are reported in Verify Data.

GST Exclusive Taxes

If you define the GST tax as an exclusive tax, the tax is applied to the subtotal of items, primary and secondary taxes, and all other charges. The GST tax is applied to every item on the guest check.

The formula the system uses to calculate the GST exclusive rate is: (amount* GST tax rate).

To configure a GST exclusive tax:

1. Select **Maintenance > Menu > Taxes**. The Taxes function tab displays.
2. Enter an unused two-digit number and press **Enter**.
3. Type a short description of the type of tax record you are creating in the **Description** text box.
4. Select the appropriate **tax type**.
5. Type the numeric value (in decimals) of the tax rate you will use for this type of tax in the **Tax Rate** text box.
6. Enter the minimum sale amount required before a tax is applied in the **Minimum Amount** text box. You may acquire this figure from the tax tables you use to collect tax on sales at your establishment.
7. Select the **GST** and **Exclusive** text boxes. Click **Save** and **Exit** to the main menu.
8. Select **Maintenance > Store Settings > International** group. The **International** subtab displays as the default subtab.
9. Select the **GST** subtab.
10. Select the GST tax record, created earlier, from the **Taxes** drop-down list.
11. Enter a dollar amount for the **Tax Invoice Threshold**.
12. Select an exempt item category for which there should not be a GST tax collected, if applicable, from the **Category** drop-down list.
13. Enter the text to display on the guest check preceding the GST tax amount in **GST Tax Text on Guest Check**.
14. Click **Save**.

A sample guest check for items with an exclusive GST tax is shown in Figure 5-125:

Item	250.00
Item	350.00
Item	400.00
Sub Total	1000.00
Tax	10.00
Additional Charge:	100.00
GST Tax:	33.30
Total	1143.30

Figure 5-125 GST Guest Check with Exclusive Tax Type

Tax Invoice

When you select a GST tax from the ‘GST Tax’ drop-down list on the GST subtab in Maintenance > Store Settings > International group, you enable the Print Tax Invoice feature. The Print GST Tax Invoice function resides in Panel Editor. You must build a button with this function in order to print a tax invoice. You may print the tax invoice prior to, or after, entering payment information.

Some jurisdictions may require your establishment’s business ID number or GST tax number print on the guest check and tax invoice. Set this up in Main-

tenance > Store Settings > System group > Store Information, as shown in Figure 5-126:

Aloha Manager - TableService

File Functions Reports Maintenance Utilities Labor Scheduler Tools View Help

Store Settings Maintenance

Group: System

Alloha Settings | Disk Maintenance | End Of Day

Date/Time | Licensing | Store Information | Interfaces

Unit No.: 1171

Unit: IBER CAFE Business Num.: 555-5555

Address: 1320 Tennis Dr Telephone 1: 8172529499

Bedford, TX Telephone 2:

Mailing Address: City / Town: State: Postal Code:

Save Cancel

Store Settings

Save this Record NUM

Figure 5-126 Business ID Number Setup

You must also select the ‘Print Business Number’ check box in Maintenance > Store Settings > Printing group > Check Content 2, shown in Figure 5-127:

Aloha Manager - QuickService

File Functions Reports Maintenance Utilities Labor Scheduler Tools View Help

Employee Mai. Store Settings Maintenance

Group: Printing

Other Chits | Employee Checkout Cfg | Reports | Chit Appearance

Check Content 1 | Check Content 2 | Check Style | Chit Content | Chit Style

☒ Do not print Voided Items

☒ Consolidate like items on check

☐ Print PMS Guest Name

☒ Print Revenue Center

☐ Print PMS Info

☐ Suppress check number

☐ Print Order Mode On Check

☐ Use Store Wide Order Numbering

Minimum Order #: Maximum Order:

☐ Print Bar Code

☐ Print Day Part on Check

☒ Print Business Number

Tax Detail:

☐ Print Tax Detail

☐ Print Total Tax Line

Save Cancel

Store Settings

Suppress printing of voided items on guest check? NUM

Figure 5-127 Print Business Number Flag

Print if Less Than Tax Threshold

When you touch the Tax Invoice button, the system compares the guest check total to the amount set in the 'Tax Invoice Threshold' text box located in Store Settings > International group > Taxes.

If the guest check is less than the threshold amount, the guest check automatically prints with the title 'Tax Invoice' displayed at the top, as shown in Figure 5-128:

<p style="text-align: center;">TAX INVOICE</p> <p style="text-align: center;">CAFE de ROSALINDA 2700 Calle de Rio Azul Tijuana, Chihuahua MEXICO</p> <p style="text-align: center;">BUSINESS ID# 3459877</p>

Figure 5-128 Sample Tax Invoice, Top Portion

Print if Greater Than Tax Threshold

If the guest check is equal to or greater than the amount entered in the 'Tax Invoice Threshold' text box, a special message box displays prompting you to: 'Enter customer name and GST/business number or address of the recipient', followed by 'Cust Info:'. Type the name and GST ID or business ID number or address of the recipient. You have 64 character spaces, or two lines available for the recipient information. The text wraps from one line to the next. A blank line separates your store information from the recipient information.

Click Print to print a copy of the tax invoice. If the invoice is printed more than once, the text 'Copy' will print.

Click Done to release the data in the special message box and return you to the Close screen. Until you click Done, you may reprint additional copies of the tax invoice. Reprints print with the word ‘COPY’ immediately after ‘TAX INVOICE’ in the heading.

Flex Taxes

Flex taxes enable tax on items that require conditional taxation. This capability permits tax configuration for a variety of circumstances. You can set up a flex tax based on the condition that the tax will always be charged. You can also set flex taxes based on the quantity of an item, the guest check subtotal, or the particular category of an item. For example, it is possible to set the system to charge no tax on a soft drink when it is ordered individually and charge tax on the same soft drink when it is combined with other food items.

If you select any flex tax record as a secondary flex tax for an item in Item Maintenance, you must also select 'Use Secondary Taxes' in Maintenance > Store Settings > Financials > Taxes and Surcharges.

For a more thorough understanding of how to configure flex taxes, please review the two examples contained later in this section.



Before flex taxes can be enabled, all applicable primary tax records must be created in Maintenance > Menu > Taxes.

Select Maintenance > Menu > Flex Taxes to display the Flex Taxes function tab, as shown in Figure 5-129:

Figure 5-129 Flex Tax Maintenance

Flex Tax ID — Holds a two-digit number that, together with 'Description', uniquely identifies each Flex Tax record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Flex Tax ID drop-down list, select the record to edit and press Enter.

Description — Contains a descriptive name that identifies the flex tax record.

Flex Type — Defines the type of flex tax. The choices are:

- Always (0) — Applies to all items in the system.
- Quantity (1) — Applies to a specific quantity of items ordered.
- Subtotal (2) — Applies to a specific subtotal value of items ordered.
- Category (3) — Applies to a specific category of items ordered.

Tax ID — Determines the tax record, as established in Maintenance > Menu > Taxes, used to calculate flex taxes on items. For example, if the ‘Always’ flex type is specified, the Tax ID specified here is applicable at all times.



The information contained here regarding taxes is intended solely as a guide for use with Aloha software. Consult state and federal regulations regarding the collecting and reporting of all taxes by your establishment.

Chaining Inset

The Chaining inset contains two text boxes in which you can specify one of the other flex taxes, depending upon the conditions defined by the tax laws in your area.

Flex Tax ID #1 — Specifies a flex tax that becomes active when the terms specified in the Conditions inset are met. The flex tax specified in this field applies only if the specified conditions succeed.

Flex Tax ID #2 — Specifies a flex tax that becomes active when the terms specified in the Conditions inset are not met. The flex tax specified in this field applies only if the specified conditions fail.

Conditions Inset

Is Item Quantity Less Than — Designates taxation by an item quantity threshold below which tax will apply. When Quantity (1) is selected as the flex type, this text box is enabled.

Is Check Subtotal Less Than — Designates taxation based on check subtotal threshold, below which tax will apply. When Subtotal (2) is selected as the flex type, this text box is enabled.

Do any items in this category appear on the check? — Designates taxation based on an item category. When Category(3) is selected as the flex type, this text box is enabled. Refer to the section immediately following on ‘Example of Category Flex Tax’ for more information about this feature.

Category Button

Click Category to open the Categories function tab and add a new category or edit an existing category, if necessary. Changing a category changes it for all items to which it is assigned.

Example of Flex Tax with Category and Always Conditions

To set the system to charge no tax on a coke when it is ordered individually and tax the same coke at 7% when it is combined with other food items, you need to create two primary tax records and three flex tax records. Once all the tax records are in place, associate just one of the flex tax records with the coke item in Menu > Items.

The two *primary* tax records are created in Maintenance > Menu > Taxes (Figure 5-117). Set up one primary tax record for Tax Coke with a tax rate of 7%, as shown in the example, Figure 5-130:

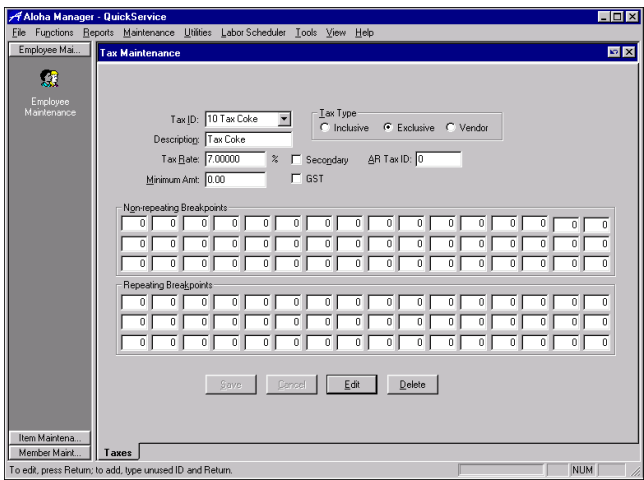


Figure 5-130 Sample Tax Coke Record

Set up the second primary tax record for No Tax Coke with a 0% tax rate, as shown in the example, Figure 5-131:

Aloha Manager - QuickService
 File Functions Reports Maintenance Utilities Labor Scheduler Tools View Help

Employee Maint. **Tax Maintenance**

Employee Maintenance

Tax ID: Tax Type: ☒ Inclusive ☒ Exclusive ☐ Vendor

Description:

Tax Rate: % ☐ Secondary AR Tax ID:

Minimum Amt: ☐ GST

Nonrepeating Breakpoints:

0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Repeating Breakpoints:

0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Item Maintenance
Member Maint.

Taxes

To edit, press Return; to add, type unused ID and Return.

Figure 5-131 Sample No Tax Coke Record

After you create the primary tax records, select Menu > Flex Taxes to set up the three *flex tax* records required to complete the scenario:

- Create a Tax Coke record with Always selected as the 'Flex Type'.
- Create a No Tax Coke record with Always selected as the 'Flex Type'.
- Create a Tax Coke with Food record with Category selected as the 'Flex Type', identifying Food as the item category, chaining to Tax Coke record as 'Flex Tax ID #1' and the No Tax Coke record as 'Flex Tax ID #2'.



Associate the final flex tax record, 'Tax Coke with Food', with the coke item in Menu > Items.

When you set up the final example, note that when you select Category as the flex type, the ‘Tax ID’ text box becomes unavailable. The primary tax rates accessed for this condition are those that are identified by ‘Flex Tax Type #1’ and ‘Flex Tax Type #2’.

The ‘Category’ flex tax type requires a selection from the ‘Category’ drop-down list, allowing you to select the food category to identify in this scenario. You want to charge tax on a coke when an item from the category is ordered with food, or when an item from the category ‘...appear(s) on the check?’ as the help text on the Flex Tax function tab suggests.

The text boxes in the Chaining inset become available when a flex type other than Always is selected, enabling you to specify the conditions to apply and when. In this example, select the Tax Coke flex tax as ‘Flex Tax ID #1’ to ensure when the category condition is met, or is successful, and food items are sold with the coke, tax on the coke is charged. Select No Tax Coke as ‘Flex Tax ID #2’ to ensure when the category condition is not met, or fails, no tax is charged on the solo coke.

An example of the Tax Coke - Always flex tax record is shown in Figure 5-132:

The screenshot shows the 'Flex Tax Maintenance' window in the Aloha Manager QuickService application. The window has a menu bar with 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. On the left is a sidebar with 'Employee Maintenance' and 'Flex Taxes' (selected). The main area contains a form for editing a flex tax record. The 'Flex Tax Id' is '06 Tax Coke', 'Description' is 'Tax Coke', 'Flex Type' is 'Always (0)', and 'Tag Id' is 'Tax Coke (10)'. The 'Conditions' section includes 'Is item quantity less than: 0', 'Is check subtotal less than: 0.00', and 'Do any items in this category...'. The 'Chaining' section shows 'Flex Tax Id #1' as 'Condition Success' and 'Flex Tax Id #2' as 'Condition Fails'. Buttons for 'Save', 'Cancel', 'Edit', and 'Delete' are at the bottom.

Figure 5-132 Sample Tax Coke - Always Flex Tax

An example of the No Tax Coke - Always flex tax record is shown in Figure 5-133:

The screenshot shows the 'Flex Tax Maintenance' window in the 'Aloha Manager - QuickService' application. The window has a menu bar with 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. On the left, there is a sidebar with 'Employee Maintenance' and 'Flex Tax Maintenance' tabs. The main area contains the following fields and sections:

- Flex Tax Id:** 05
- Description:** No Tax Coke
- Flex Type:** Always (0)
- Tag Id:** No Tax Coke (11)
- Conditions:**
 - Is item quantity less than: 0
 - Is check subtotal less than: 0.00
 - Do any items in this category...
 - Category: (empty)
 - ...appear on the check?
- Chaining:**
 - Flex Tax Id #1: (empty) Condition Success
 - Flex Tax Id #2: (empty) Condition Fails

At the bottom of the window, there are four buttons: 'Save', 'Cancel', 'Edit', and 'Delete'. Below the buttons, there is a section labeled 'Flex Taxes' with a sub-label 'Name identifiers for this flex tax' and a 'NUM' field.

Figure 5-133 Sample No Tax Coke - Always Flex Tax

An example of the Tax Coke with Food - Category flex tax record is shown in Figure 5-134:

The screenshot shows the 'Flex Tax Maintenance' window in the 'Aloha Manager - QuickService' application. The window has a menu bar with 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. On the left is a sidebar with 'Employee Maintenance' and 'Flex Taxes' tabs. The main area contains the following fields:

- Flex Tax Id: 07 Tax Coke w Food
- Description: Tax Coke w Food
- Flex Type: Category (3)
- Tag Id: Tax Coke (10)
- Conditions:
 - Is item quantity less than: 0
 - Is check subtotal less than: 0.00
 - Do any items in this category...
 - Category: FOOD (10000)
 - ...appear on the check?
- Chaining:
 - Flex Tax Id #1: Tax Coke (06) Condition Success
 - Flex Tax Id #2: No Tax Coke (05) Condition Fails

Buttons at the bottom: Save, Cancel, Edit, Delete.

Figure 5-134 Sample Tax Coke with Food - Category Flex Tax

Example of Canadian GST and Provincial Flex Tax with Always, Quantity and Subtotal Conditions

The sample graphics in this section are based on an example involving the interaction of the Canadian Provincial and Canadian GST taxes. These two taxes work interdependently to tax food items, such as donuts, in accordance with the quantity purchased and the subtotal of the guest check. For example, if six donuts are purchased and if the guest check subtotal is less than \$4.00, only the Canadian GST tax may apply. If six donuts are purchased and the guest check subtotal is \$4.00 or more, the system can be set to apply both Canadian GST and Canadian Provincial taxes. If more than six donuts are purchased in this scenario, the system can be configured to suspend both taxes.

To implement the taxation in this scenario, create four primary tax records and five flex tax records. Once all the tax records are in place, associate just one of the flex tax records with the 'plain donut' item in Menu > Items.

The following graphics illustrate the basic *primary* tax records required to support the sample Canadian tax scenario, including the Canadian GST and Canadian Provincial taxes.



Canadian GST taxes are unique to Canada and are best configured in the flex tax module rather than the GST module. Therefore, the ‘GST’ check box is not selected in any of the examples that follow.

Primary tax records are created in Maintenance > Menu > Taxes. An example of the primary Canadian GST tax is shown in Figure 5-135:

The screenshot shows the 'Tax Maintenance' window in the 'Aloha Manager - QuickService' application. The window has a menu bar with 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. On the left is a sidebar with 'Employee Mai...' and 'Employee Maintenance' (with a person icon). The main area is titled 'Tax Maintenance' and contains the following fields: 'Tax ID:' with a dropdown menu showing '17 Canadian GST'; 'Description:' with a text box containing 'Canadian GST'; 'Tax Rate:' with a text box containing '7.00000' and a '%' symbol; 'Minimum Amt:' with a text box containing '0.00'; 'Tax Type' with radio buttons for 'Inclusive', 'Exclusive' (which is selected), and 'Vendor'; 'Secondary' checkbox (unchecked); 'AR Tax ID:' with a text box containing '0'; and 'GST' checkbox (unchecked). Below these are two sections: 'Non-repeating Breakpoints' and 'Repeating Breakpoints', each with a 3x10 grid of input boxes, all containing '0'. At the bottom are 'Save', 'Cancel', 'Edit', and 'Delete' buttons. A status bar at the very bottom says 'To edit, press Return; to add, type unused ID and Return.' and has a 'NUM' indicator.

Figure 5-135 Sample Canadian GST Record

An example of the primary Canadian Provincial tax is shown in Figure 5-136:

The screenshot shows the 'Tax Maintenance' window in the 'Aloha Manager - QuickService' application. The 'Tax ID' is set to '16 Provincial'. The 'Tax Type' is 'Inclusive'. The 'Description' is 'Provincial'. The 'Tax Rate' is '8.00000 %'. The 'Minimum Amt.' is '0.00'. The 'Secondary' checkbox is unchecked, and the 'GST' checkbox is checked. The 'AR Tax ID' is '0'. There are two tables of 'Non-repeating Breakpoints' and 'Repeating Breakpoints', each with 10 columns and 3 rows, all containing '0'. At the bottom, there are buttons for 'Save', 'Cancel', 'Edit', and 'Delete'. The status bar at the bottom indicates 'To edit, press Return; to add, type unused ID and Return.' and 'NUM'.

Figure 5-136 Sample Canadian Provincial Tax Record

An example of a primary tax that includes a combination of both Canadian GST and Canadian Provincial tax rates is shown in Figure 5-137:

The screenshot shows the 'Tax Maintenance' window in the 'Aloha Manager - QuickService' application. The 'Tax ID' is set to '14 Can GST & Prc'. The 'Tax Type' is 'Inclusive'. The 'Description' is 'Can GST & Prov'. The 'Tax Rate' is '15.00000 %'. The 'Minimum Amt.' is '0.00'. The 'Secondary' checkbox is unchecked, and the 'GST' checkbox is checked. The 'AR Tax ID' is '0'. There are two tables of 'Non-repeating Breakpoints' and 'Repeating Breakpoints', each with 10 columns and 3 rows, all containing '0'. At the bottom, there are buttons for 'Save', 'Cancel', 'Edit', and 'Delete'. The status bar at the bottom indicates 'To edit, press Return; to add, type unused ID and Return.' and 'NUM'.

Figure 5-137 Sample Combination of Canadian GST and Provincial Taxes

An example of a tax record that specifies no tax, or a tax rate of zero percent, is shown in Figure 5-138:

The screenshot shows the 'Tax Maintenance' window in the 'Aloha Manager - QuickService' application. The window has a menu bar with 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. On the left is a sidebar with 'Employee Maintenance' and a 'Taxes' tab. The main area contains the following fields and controls:

- Tax ID:** A dropdown menu showing '18 No Tax'.
- Tax Type:** Radio buttons for 'Inclusive' (selected), 'Exclusive', and 'Vendor'.
- Description:** A text field containing 'No Tax'.
- Tax Rate:** A text field containing '0.00000' followed by a '%' symbol.
- Minimum Amt:** A text field containing '0.00'.
- Secondary:** An unchecked checkbox.
- ΔR Tax ID:** A text field containing '0'.
- GST:** An unchecked checkbox.
- Non-repeating Breakpoints:** A grid of 24 small input fields, all containing '0'.
- Repeating Breakpoints:** A grid of 24 small input fields, all containing '0'.
- Buttons:** 'Save', 'Cancel', 'Edit', and 'Delete' at the bottom.

At the bottom of the window, there is a status bar with the text 'To edit, press Return; to add, type unused ID and Return.' and a 'NUM' indicator.

Figure 5-138 Sample of No-Tax Record

After you create the primary tax records, create the following *flex tax* records in the order in which they are listed:

- Create a No Tax record with Always selected as the 'Flex Type'.
- Create a Canadian GST record with Always selected as the 'Flex Type'.
- Create a Canadian GST and Provincial record with Always selected as the 'Flex Type'.
- Create a Canadian GST record with Subtotal selected as the 'Flex Type', chaining to 'Flex Tax ID #1' as Canadian GST- Always and 'Flex Tax ID #2' as Canadian GST & Provincial - Always.
- Create a Canadian GST record with Quantity selected as the 'Flex Type', chaining to 'Flex Tax ID #1' as the Canadian GST Subtotal

type you just created, and the No Tax - Always record as 'Flex Tax ID #2'.



It is not possible to create Quantity, Subtotal, or Category flex taxes if the Always flex taxes which they utilize do not exist. For this reason, you must create flex taxes in the proper order.

The following graphics illustrate the flex taxes required to configure the Canadian tax scenario. (They are shown in the order in which they should be created.)

An example of the No Tax - Always flex type tax is shown in Figure 5-139:

The screenshot shows the 'Flex Tax Maintenance' window in the 'Aloha Manager - QuickService' application. The window has a menu bar with 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. The left sidebar contains 'Employee Maintenance' and 'Flex Taxes'. The main area contains the following fields and controls:

- Flex Tax Id:** A dropdown menu showing '01 No Tax - Always'.
- Description:** A text field containing 'No Tax - Always'.
- Flex Type:** A dropdown menu showing 'Always (0)'.
- Tax Id:** A dropdown menu showing 'No Tax (18)'.
- Conditions:** A section with three checkboxes:
 - ☐ Is item quantity less than: [0]
 - ☐ Is check subtotal less than: [0.00]
 - ☐ Do any items in this category...
Category: [] ...appear on the check?
- Chaining:** A section with two checkboxes:
 - ☐ Flex Tax Id #1: [] Condition Success
 - ☐ Flex Tax Id #2: [] Condition Fails

At the bottom of the window are buttons for 'Save', 'Cancel', 'Edit', and 'Delete'. A status bar at the very bottom says 'To edit, press Return; to add, type unused ID and Return.' and has a 'NUM' indicator.

Figure 5-139 Sample No Tax - Always Flex Type

An example of the Canadian GST - Always flex type tax is shown in Figure 5-140:

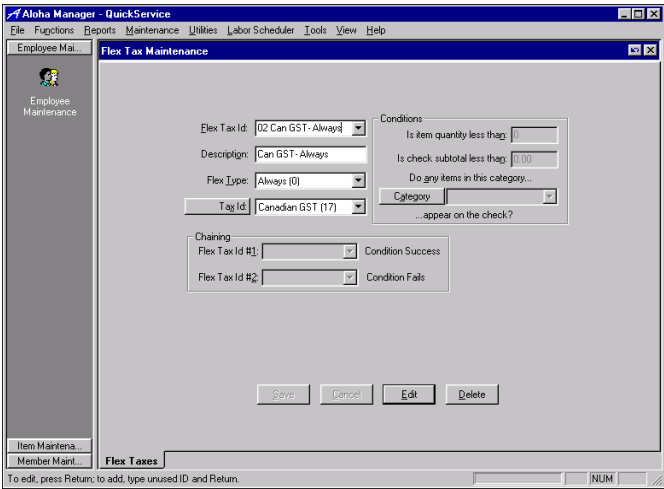


Figure 5-140 Sample Canadian GST- Always Flex Type

An example of the Canadian GST & Canadian Provincial - Always flex type tax is shown in Figure 5-141:

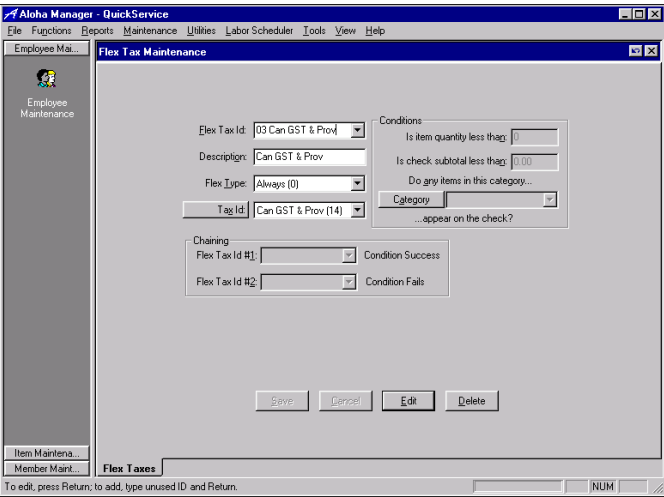


Figure 5-141 Sample Canadian GST and Provincial - Always Flex Type

An example of the Canadian GST - Subtotal flex type tax is shown in Figure 5-142:

The screenshot shows the 'Flex Tax Maintenance' window in the 'Aloha Manager - QuickService' application. The window has a menu bar (File, Functions, Reports, Maintenance, Utilities, Labor Scheduler, Tools, View, Help) and a sidebar with 'Employee Maintenance' and 'Flex Taxes' tabs. The main area contains the following fields:

- Flex Tax Id: 13 Can GST - Subto
- Description: Can GST - Subto
- Flex Type: Subtotal (2)
- Tag Id: Tax Coke (10)
- Conditions:
 - Is item quantity less than: 0
 - Is check subtotal less than: 4.00
 - Do any items in this category...
 - Category: FOOD (10000)
 - ...appear on the check?
- Chaining:
 - Flex Tax Id #1: Can GST - Always (1) Condition Success
 - Flex Tax Id #2: Can GST & Prov (0) Condition Fails

Buttons at the bottom: Save, Cancel, Edit, Delete. A status bar at the bottom says 'To edit, press Return; to add, type unused ID and Return.' and 'NUM'.

Figure 5-142 Sample Canadian GST - Subtotal Flex Type

An example of the Canadian GST - Quantity flex type tax is shown in Figure 5-143:

The screenshot shows the 'Flex Tax Maintenance' window in the 'Aloha Manager - QuickService' application. The window has a menu bar (File, Functions, Reports, Maintenance, Utilities, Labor Scheduler, Tools, View, Help) and a sidebar with 'Employee Maintenance' and 'Flex Taxes' tabs. The main area contains the following fields:

- Flex Tax Id: 14 Can GST - Qty
- Description: Can GST - Qty
- Flex Type: Quantity (1)
- Tag Id: Tax Coke (10)
- Conditions:
 - Is item quantity less than: 7
 - Is check subtotal less than: 0.00
 - Do any items in this category...
 - Category: FOOD (10000)
 - ...appear on the check?
- Chaining:
 - Flex Tax Id #1: Can GST - Subto (1) Condition Success
 - Flex Tax Id #2: No Tax - Always (0) Condition Fails

Buttons at the bottom: Save, Cancel, Edit, Delete. A status bar at the bottom says 'To edit, press Return; to add, type unused ID and Return.' and 'NUM'.

Figure 5-143 Sample Canadian GST - Quantity Flex Type

After creating all flex taxes that establish the Canadian GST and Provincial tax scenario for donuts, you must associate the donuts item to the flex tax.



If an item taxes incorrectly once it has been correctly associated with a flex tax, check the category of the item. If the item is not in the category to which the taxes are set to apply, you may need to change the category of the item.

Select Menu > Items. Select the donuts item from the ‘Number’ drop-down list. Select Canadian GST-Subtotal from the ‘Flex Tax’ drop-down list, as shown in Figure 5-144:

The screenshot shows the 'Item Maintenance' window in the 'Aloha Manager - QuickService' application. The 'Item' tab is active, displaying various fields for item configuration. The 'Number' dropdown is set to '005005 Plain Donut'. The 'Flex Tax' dropdown is set to 'Can GST - Qty (14)'. Other visible fields include 'Spot Name', 'Chit Name', 'Long Name', 'Control Name', 'Priority' (40), 'Cost' (0.00), and 'Multiplier' (1). The 'Member of Category' is set to 'FOOD'. The 'Auto Menu Priority' is also visible. At the bottom, there are buttons for 'Save', 'Cancel', 'Edit', 'Delete', and 'Quick Count'.

Figure 5-144 Associate Donut Item with Flex Tax

Size Groups

The Aloha system enables you to order multiple sizes of an item that have corresponding modifiers that change with the size of the ordered item.

Size groups provide button consolidation for the Front-of-House interface. A default size of an item is placed on a button and used for ordering. Function buttons are added to increment up, decrement down, and 'leap' to a specific size level. After the default size is ordered, the function buttons change the size and prices associated with the size.

For example, a sandwich shop has three sizes of sandwiches. A small sandwich has two ounces of meat, and one pickle on a small bun; the medium sandwich has four ounces of meat, and two pickles on a six inch sandwich; the large sandwich has eight ounces of meat and four pickles on a twelve inch sandwich. Each modifier has a separate price associated with it based on the size of the sandwich.

A size group must be created for each the following components:

- The menu item that will change size, in sequential order.
- All corresponding modifiers for the menu item.

All components of the size group must be placed in order of size to properly increment and decrement.

Size groups can accomplish a multitude of functions, such as bulk ordering, upselling, pizza ordering, and more.



Refer to the Panel Editor section in this chapter for more information on placing buttons on the FOH terminal.

Select Maintenance > Menu > Size Groups to display the Size Groups function tab, as shown in Figure 5-145:

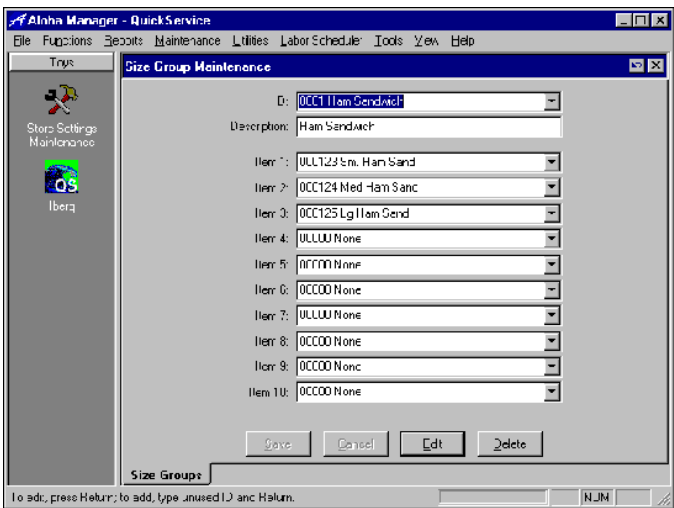


Figure 5-145 Size Groups Function Tab

ID — Holds a five digit number that together with 'Description' uniquely identifies each category record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record to edit and press Enter.

Description — Enter a descriptive name to identify the size group.

Item 1 through Item 10 — Select an item from the item record in descending or ascending order of their size. For example, 'Small Ham', 'Medium Ham' and 'Large Ham' from the smallest to the largest. The item must coincide with its corresponding modifiers in the same order of size.

Surcharges

Surcharges are different from regular taxes in that a surcharge is based on the quantity of the item sold instead of on the price of the item. Restaurants in some jurisdictions require a method to recapture surcharges on certain menu items. In many of these cases, the surcharges are actually additional flat-rate taxes levied on alcoholic beverages on a volume basis. For example, a state may have a surcharge of \$13.50 per gallon on liquor. The Aloha system allows restaurant owners to recapture such taxes through the Surcharge feature.



Exclusive surcharge taxes are combined with the tax on guest checks, even though surcharges look to be applied after the tax is on the check. Inclusive surcharge taxes are listed at the bottom of the guest check.

Select Maintenance > Menu > Surcharges to display the Surcharges function tab, as shown in Figure 5-146:

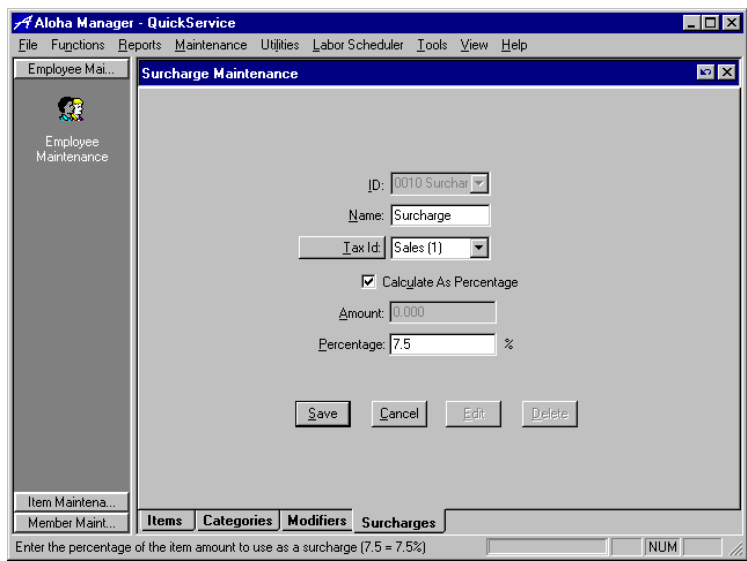


Figure 5-146 Surcharges Function Tab

ID — Holds a four-digit number that together with 'Name' uniquely identifies each Surcharge record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record to edit and press Enter.

Name — Enter a name that uniquely identifies the surcharge.

Tax ID — Select a tax record, as defined in Maintenance > Menu > Taxes, to apply to the surcharge from the drop-down list.

Tax ID Button

Click Tax ID to access the Taxes function tab and create new taxes, if necessary. Changing tax information in the function tab changes the tax for all items assigned to that tax.

Calculate as Percentage — Calculates the surcharge as a percentage. When selected, the Percentage text box is available. If not selected, the surcharge is a fixed amount, which is entered in the 'Amount' text box.

Amount — Holds a decimal number representing the flat rate, in dollars and cents, to apply to the price of items requiring a surcharge. In the case of a surcharge of \$13.50 per gallon of liquor, the amount could be based on the apportioned amount of liquor served in a single drink: one ounce of liquor would require a surcharge of \$10.55 cents to recapture the surcharge amount. This surcharge could then be assigned to all appropriate liquor menu items requiring a surcharge. 'Amount' is available when 'Calculate as Percentage' is not selected.

Percentage — Enter a percentage of the item amount to use as a surcharge, such as '7.5' for '7.5 percent'. Percentage is available when 'Calculate as Percentage' is checked.

Special Pricing

The Special Pricing submenu contains Fixed Item Pricing and Quantity Pricing. These are just two of the pricing methods available in the system. However, these two methods are at the top of the hierarchy when the price for an item is determined. Quantity Pricing and Fixed Item Pricing override all other pricing methods, in that order.

Quantity Pricing

Quantity Pricing enables an item to be priced by quantity or weight, such as a dozen hot wings or one pound of cole slaw. When the item is ordered, a prompt displays on the FOH order entry terminal enabling entry of the quantity or weight of the item. The total price of the product is then calculated based on the quantity entered or the weight (less the tare weight, if applicable) times the Unit Price established here in Quantity Pricing.



If the Scales is being used, the weight measurement is automatically brought forward to this field.

Select Maintenance > Menu > Special Pricing > Quantity Pricing to display the Quantity Pricing function tab, as shown in Figure 5-147:

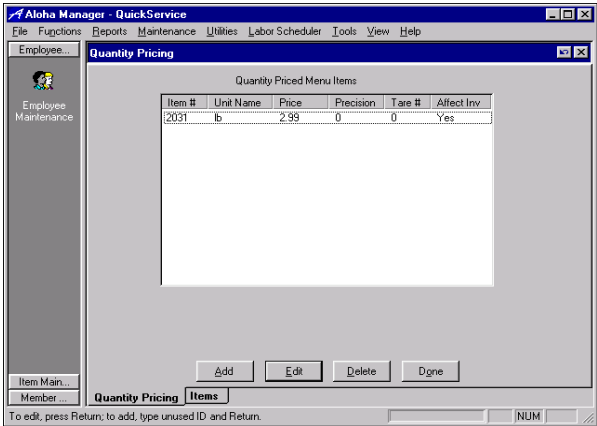


Figure 5-147 Quantity Pricing Function Tab

The command buttons enable you to add, edit, or delete items in Quantity Pricing. To edit or delete an existing item, first select the item, then click Edit or Delete.

To create a quantity item pricing item:

1. Click **Add**. The Quantity Item Price dialog box displays, as shown in Figure 5-148:

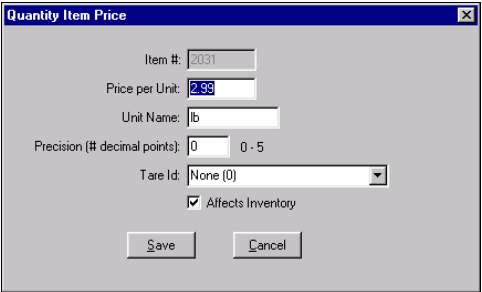


Figure 5-148 Quantity Item Price Dialog Box

2. Complete the following information:

Item # — Enter the item number assigned to the item in Maintenance > Menu > Items.

Price per Unit — Designates the price of the item per unit. The price depends on the unit of measure entered in the 'Unit Name' text box.

Unit Name — Enter a descriptive name for the unit of measure. For example, if the 'Unit Name' is LB (pound), the 'Price per Unit' is the price of the item per pound. If the Unit Name is DZ, the 'Price per Unit' is the price of the item per dozen.

Precision (# decimal points) — Designates up to five decimal points that can be used by the FOH when the weight measurement is entered (i.e., a Precision set at 2 enables 2.53 pounds to be entered, and a Precision set at 3 enables 2.537 pounds to be entered).

Tare ID — Identifies a pre-weighed container in which items are to be weighed for sale. The weight of this container is deducted from the weight entered in the FOH. Select a 'Tare ID' from the drop-down list



A tare weight is not subtracted if the item weight is entered by the Scales function. Refer to the Accessories manual for more information on tare weights.

Affects Inventory — Indicates the item should be deleted from inventory.

3. Click **Save**. The Quantity Pricing dialog box displays to allow further maintenance.
4. Click **Done** and exit the function.

Price Levels

The Price Levels pricing method enables a common price to be assigned to items in a group. For example, all large soft drinks are the same price, regardless of the specific type. Create a price level called Large Soft Drinks and set the common price in the price level. The price level to use can be designated at the item level, the submenu level, and the modifier level. When the price is changed in the price level, all items set to that price level reflect the price change.



Refer to the Pricing Methods and Pricing Hierarchy section at the beginning of this chapter for more information on pricing.

Select Maintenance > Menu > Price Levels to display the Price Levels function tab, as shown in Figure 5-149:

The screenshot shows the 'Aloha Manager - QuickService' application window. The 'Maintenance' menu is open, and the 'Price Level Maintenance' sub-menu is selected. The 'Price Level Maintenance' window is displayed, showing a 'Price Level' dropdown menu with '0002.15' selected, a 'Description' text field with '15', and a 'Price' text field with '0.15'. Below these fields are four buttons: 'Save', 'Cancel', 'Edit', and 'Delete'. The window also has a sidebar with 'Employee Maintenance' and 'Item Maintenance' options. At the bottom, there are tabs for 'Quantity Pricing', 'Items', and 'Price Levels', with 'Price Levels' being the active tab. A status bar at the bottom indicates 'To edit, press Return; to add, type unused ID and Return.' and a 'NUM' button.

Figure 5-149 Price Levels Function Tab

Price Level — Holds an unused number between 1 and 9999 that together with 'Description' uniquely identifies each Price Level. To create a new price level, enter an unused number and press Enter. To edit an existing price level, scroll through the Price Level drop-down list, select the record and press Enter.

Description — Enter a descriptive name to identify the price level.

Price — Enter a price to be charged for each item in the group.

Price Changes

The Aloha POS system provides flexibility in establishing a price for an item. The Price Change function further enhances this flexibility by enabling an item's price to be temporarily changed for a specified time frame rather than manually accessing each item record, price level, or promotion and modifying the price. A price change record can include a single selection or it can contain multiple selections of each type, therefore, creating a 'batch' price change.

For example, a price change can be used to modify the price of a hamburger promotion that is sold at a reduced price on a certain day of the week.



Do not press 'Enter'. If this key is pressed, Edit mode is exited and the list is not updated. An 'x' displays to the left of each item or price level that has been selected.

A 'happy hour' price change can be activated to modify the price of the appetizer menu items, and also include a change for the price level used for imported beer. This is accomplished using the 'Set Price Change' and 'Disable Price Change' events located in Maintenance > System > Events. Use the 'Set Price Change' event to activate the price change.



If a Disable Price Change event is not specified for a Price Change, the Price Change becomes inactive at EOD.

The Event Time and Type dialog box provides you the flexibility of activating the event whenever you want. The 'Disable Price Change' event is used to deactivate a price change that needs to end on the same business day in which it was activated, but before the EOD.

Select Maintenance > Menu > Price Changes to display the Price Changes function tab, as shown in Figure 5-150:

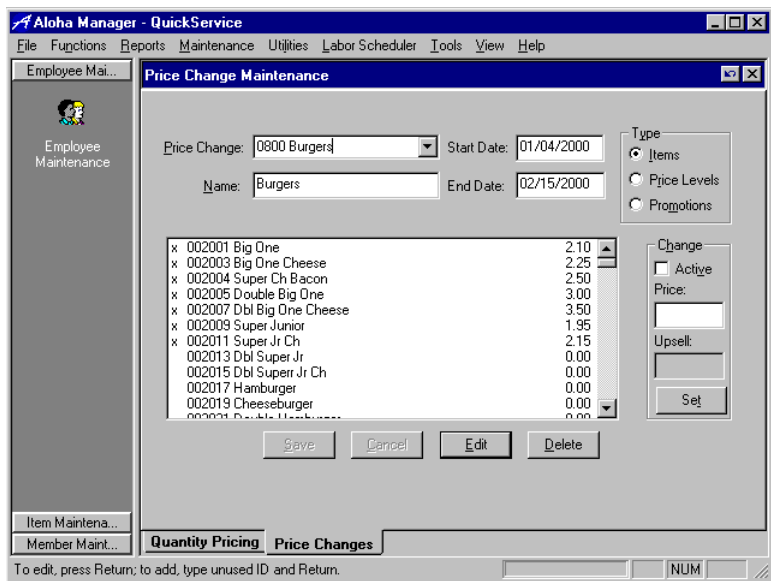


Figure 5-150 Price Changes Function Tab

Price Change — Holds a four-digit number that together with 'Name' uniquely identifies each Price Change. To create a new Price Change, enter an unused number and press Enter. To edit an existing record, scroll through the Price Change drop-down list, select the record to edit and press Enter.

Name — Enter a name to identify the price change.

Start Date and End Date

When an event is fired, unless otherwise specified, it ends when the EOD process runs. The 'Start Date' and 'End Date' text boxes work in conjunction with the 'Set Price Change' event in Event Scheduler, and enable you to control the date, or range of dates, in which a Set Price Change event is active. These dates are used to fire up the event when the DOB occurs between the range of dates specified in the Price Change record activated by the event.

Start Date — Establishes the first date in which the Price Change should be in effect.

End Date — Establishes the ending date for the price change.

Type Inset

Use these options to toggle the selection between items, price levels, and promotions when making the price change selections. Only one option can be selected at a time; however, a price change can contain price changes for a combination of all three types, therefore, creating a 'batch'.

Items — Displays the items in the Item file in the selection list.

Price Levels — Displays all price levels defined in Maintenance > Menu > Price Levels in the selection list (without prices).

Promotions — Displays all promotions defined in Maintenance > Menu > Promotions in the selection list (without prices). If the promotion is defined as a percentage, the Price text box accepts a percentage value.

- **Quick Combos** — Select a promotion defined as a quick combo to activate the upsell text box.
- **New Price Promotion** — Displays all items defined in the New Price Promotion record. Select an individual item record to set the a new price change for the item.

Change Inset

Active — Activates the price override for the selection. However, the price change does not take effect until the batch is activated using the Set Price Change event.

Price — Designates the new price for the selection when the price change is in effect. If the promotion is defined as a percentage, specify the percentage in this text box. Percentages are entered as a number and two decimal places. For example, a percentage of 10% is entered as 10.00.



To deactivate an item price change, clear the ‘Active’ check box and click Set. If you do not click Set before saving, the price change will still be active.

Upsell — Specifies an additional amount to charge if the customer requests an upsell for a Quick Combo promotion. This text box is only active for the Quick Combo promotion type.

Set Button

Click Set to accept the price level change entered in the ‘Price’ text box and update the price in the selection list with the temporary price. Do not press Enter before clicking Set. If you do, Edit mode is exited and the list is not updated.

An 'x' displays to the left of each item, price level, or promotion in which 'Active' is selected.

Payments Maintenance Functions

This chapter discusses creating and setting up payment tenders, promotions, comps, gift certificates, house accounts, and foreign currencies.

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Chapter 6

Aloha®

Payments can be configured with unlimited payment options such as payment methods, customized tenders, promotions, comps, gift certificates, house accounts, and foreign currencies. In addition, automatic credit card authorization, pre-authorization, and online approval are set up in Payments.

In this chapter you learn how to:

- Create and configure multiple types of tenders.
- Create and configure promotions.
- Create and configure comps.
- Create and configure gift certificates.
- Set up and manage house accounts.
- Set up and define foreign currencies.

To access payments, select Maintenance > Payments from the Aloha Manager menu, as shown in Figure 6-1:

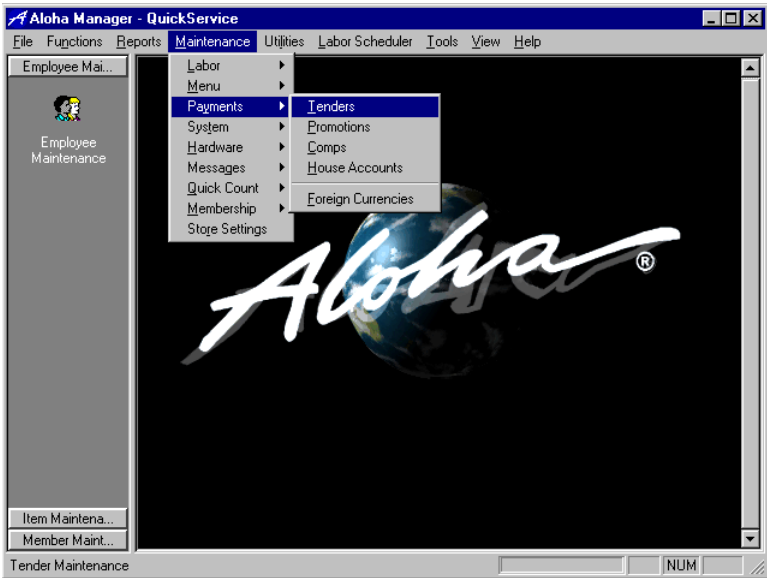


Figure 6-1 Payments, Main Menu

Tenders



Refer to Chapter 5, Menu Maintenance Functions, for further information on using Panel Editor.

The Tenders function enables you to define up to 999 payment methods for use in the Aloha POS system. This function is used to define the characteristics of each tender, and parameters for handling cash and credit card payments. Tenders are placed on the FOH using the Panel Editor feature accessed in Maintenance > Menu > Panel Editor.

Select Maintenance > Payments > Tenders to display the Tenders function tab, shown in Figure 6-2:

Figure 6-2 Tenders

Number — Holds a three-digit number that together with 'Name' uniquely identifies the tender record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Number drop-down list, select the record and press Enter.

The Tenders function tab provides the following subtabs: Tender, Type, Identification, Authorization, Back Office, and Reconciliation.

Tender Subtab

The Tender subtab enables you to determine FOH tender button placement and set overpayments in the Overpayment inset. Select the Tender subtab from the Tender Maintenance function tab to edit and enter tender information.

A cash tender with \$0.00 default value displays the FOH cash screen for entering an amount. If there are no cash tenders defined with a \$0.00 value in 'Default Amt', one must be created. Label this tender 'Cash'.



The FOH does not run unless a cash tender with a \$0.00 default amount is defined.

Name — Enter a unique name to identify the record. There must be at least one cash tender type defined without a default amount assigned.

Report as — Enables you to combine tenders together for reporting purposes. This contains a drop-down list of previously defined tenders.



To report a tender as itself, save it, then access the tender and select it from the 'Report as' drop-down list.

Printer — Prints an extra copy of the closed check is printed on this printer. Select a printer from the drop-down list.

Printer Button

Click Printer to access the Printer Group function tab. Here you can perform maintenance in the Printer Group function, including add printers if the printer is not already there.

Default Amt — Defines the amount to display on the button in the FOH. Buttons for specific amounts can be created when the 'Cash' check box is selected. For example, a cash tender type with a default amount of \$20.00 can be created for a cash bill of this denomination. Configuring bills in this manner saves time at the FOH terminal when applying payments.

Active — Sets the defined tender type to active, placing the corresponding tender button on the order entry terminals in the button position defined in Panel Editor. Only one tender type can occupy a button position at any one time.

Track — No longer used by the system.

Can Refund — Assigns refund ability to the tender. Non-cash tenders that require this status must have this selection enabled. In the case of credit cards, refunds are available without this setting if the 'Authorize Using EDC' setting on the Authorization subtab is **not** enabled. If you are using EDC to authorize and post credit card charges, you must enable the 'Can Refund' feature before refunds can be made.

Affect Deposit — Indicates the tender affects the over/short calculation of deposits. Select this check box for tenders such as cash and personal checks. Clear the check box for tenders such as credit cards

Print Check on Close — Sets the tender type to automatically print a copy of the guest check when the check is closed. If 'Print Check on Close' is applied to the default tender 'Cash', it applies to all increments of defined cash tenders. For example, \$5.00, \$10.00, and \$20.00 tenders are all defined as cash tenders on the Type subtab. Any guest check closed with these tenders, singly or in combination, causes the guest check to print, if this setting is enabled, because they are defined as cash tenders.

Open Drawer on Close — Automatically opens the cash drawer when the check is closed. It should not be selected for tender types that do not need the cash drawer opened.

Print Signature Line — Prints a signature line on the guest check. This is a useful option for house accounts.

Overpayment Inset

Allow Overpayment — Permits an amount greater than the guest check total to be entered in the FOH when the guest check is closed, therefore, allowing the customer to receive cash back. The excess amount can be limited to a percentage of the guest check or it can be a set dollar amount.

Limit by Percent — Defines the amount entered in 'Excess' as a percentage, not a set dollar amount.

Excess — Used in conjunction with the 'Allow Overpayment' check box. Enter a decimal percentage if 'Limit By Percent' is selected (.20 = 20%) or enter a set dollar amount (10.00 = \$10.00).

Manager Can Always Overpay — Prompts the manager to enter a password to override the limit defined in 'Limit By Percent' and 'Excess'.

Provide Change — Calculates change for the customer for this tender type. Change due is displayed on order entry terminals.

Tips Inset

Allow Tips — Tracks tips for the defined tender type. This is usually selected for credit card tender types.

Maximum Tip% — Specifies the maximum allowable tip percentage as a percentage of the total sale for the defined tender type. Enter 0.50 for a 50% maximum percent figure.



The 'Maximum Tip%' is not enforced if set over 100 percent.

Remove Tip Line if Auto Gratuity — Removes the tip line on the receipt if an automatic gratuity has been applied to the check.

Type Subtab

The Type subtab specifies the type of tender you are defining, such as cash, credit card, cash card, house account, or debit card. Select the Type subtab from the Tenders function tab to define the type of tender, as shown in Figure 6-3:

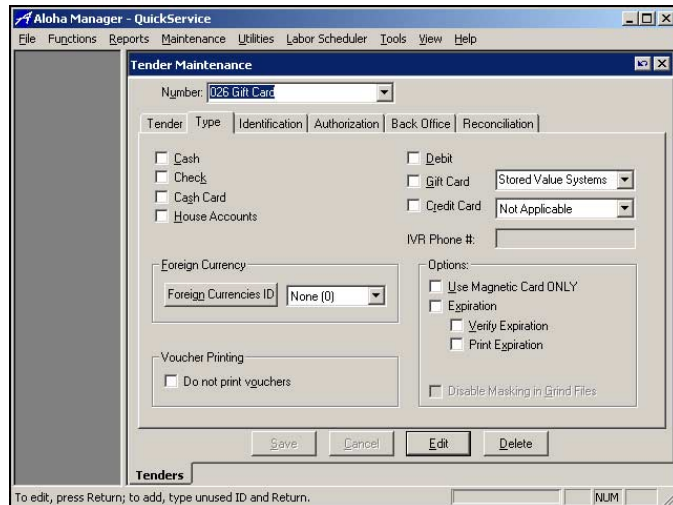


Figure 6-3 Tenders, Type Subtab

Cash — Defines the tender as a cash tender.

Check — Defines the tender as a check. This selection may be used to define personal checks or travelers checks.

Cash Card — Defines the tender as a cash card.

House Accounts — Defines the tender as a house account.

Debit — Defines the tender as a debit card. Debit card charges are immediately taken out of the bank account if the account has sufficient funds. You can mask the full or partial debit card number from appearing on the voucher and the Payment report, with the ‘Credit Card Number Mask’ drop-down box in Store Settings > Credit Card > EDC Setup. If you are using debit cards, you must adhere to the following restrictions for the initial phase of this feature:

- You must interface the Aloha system with the Aloha EDC package to dial out for verification using either the NDC or Visanet processor.
- You must interface the Aloha system with either the VeriFone PINPad 1000, VeriFone Everest, or VeriFone Everest Plus device to allow the guest to enter their PIN number. VeriFone Everest and VeriFone Everest Plus use the same emulation, so they are not listed as separate devices. Refer to the PIN Pad inset in Maintenance > Hardware > Terminals > Other and select the correct device and port.
- To enable a ‘Cash Back’ button to appear on the FOH tender screen and allow an employee to enter an overpayment amount, select ‘Allow Overpayment’ and clear ‘Allow Tips’.
- You must enter debit cards using a magnetic stripe reader to capture the card information. They can not be entered manually. If the card is declined, you can re-initiate the entry.
- You can not void, force, or adjust a payment applied with an approved debit card. To remove a charge, you must refund the amount by swiping the card and entering the PIN number again. You can not refund the amount from the BOH.
- You can not perform a debit card transaction when Aloha EDC is in spool down.
- We do not support the Canadian Debit card.

Gift Card — Defines the tender as a gift card. Select gift card and a host processor from the drop-down list.

Credit Card — Defines the tender as a credit card. Select credit card and a processor from the drop-down list. You can mask the full or partial debit card number from appearing on the voucher with the ‘Credit Card Number Mask’ drop-down box in Store Settings > Credit Card > EDC Setup.



Refer to the Aloha EDC User’s Guide for further information on the NDC and Visanet processors.



Refer to the Aloha QuickService Special Features Guide for more information on gift cards.

IVR Number — Holds the Integrated Voice Response (IVR) number to contact the Stored Value Systems host. This is only used if you select Stored Value Systems from the ‘Gift Card’ drop-down list.

Foreign Currency Inset

Foreign Currency ID — If using foreign currency, select the ID that corresponds to the current tender from the drop-down list. These are set up in Maintenance > Payments > Foreign Currencies.

Foreign Currencies ID Button

Click Foreign Currencies ID to access the Foreign Currencies function tab. Here you can perform maintenance in the Foreign Currency function, including add new foreign currencies if the foreign currency you need is not already there. Note that changing foreign currency information in the function tab changes the foreign currency information for all tenders assigned to the foreign currency.

Voucher Printing Inset

Do Not Print Vouchers — Suppresses vouchers for non-cash tenders from printing. Select this option when you do not need a signed voucher from the guest when you use this tender, such as meal discount cards.

Options Inset

Use Magnetic Card Only — Prevents a server from manually entering a gift card or credit card number when applying a payment. The system prompts for a manager password when a server attempts to manually enter the number.



You can override this setting for certain employees and allow them to enter the gift card number without manager approval by selecting ‘Manual Card #’ in the access level to which they are assigned. This setting is located in Maintenance > Labor > Access Levels > Financials.

Expiration — Sets order entry terminals to automatically prompt for a credit card or gift card expiration date.

Verify Expiration — Checks the credit card or gift card expiration date against the system date to automatically verify the card has not expired.

Print Expiration — Prints the credit card or gift card expiration date on the guest check.

Identification Subtab

The Identification subtab defines the ID requirements screen used by the order entry terminals to identify credit cards and validate customer IDs. Select the Identification subtab from the Tender function tab to edit and enter identification information, as shown in Figure 6-4:

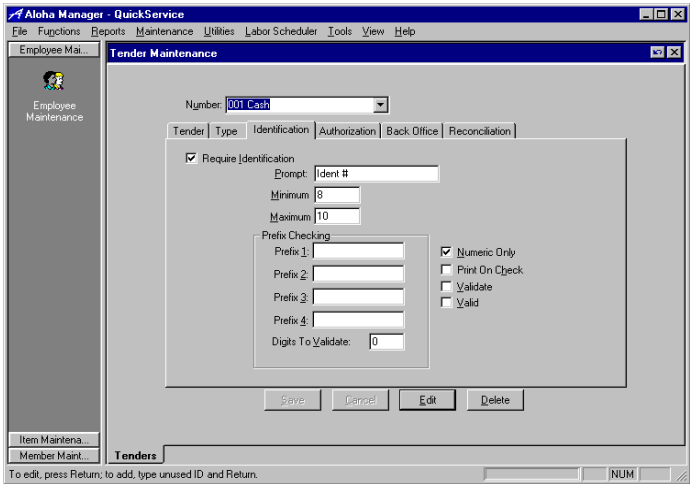


Figure 6-4 Tenders, Identification Subtab

Require Identification — Enables an Identification prompt on order entry screens. Forces the employee to enter the ID information. The check cannot be closed if the requirements specified in this tab are not met.

Prompt — Text that displays on the order entry terminal prompting for the ID information, such as 'Card #'.

Minimum — Defines the minimum number of digits allowable for the defined credit card.

Maximum — Defines the maximum number of digits allowable for the defined credit card.

Prefix Checking Inset

Prefix 1 through Prefix 4 — Defines valid number prefixes for the credit card tender type up to the first eight digits. These prefixes are used in the validation process. It is not necessary to enter prefixes for predefined credit card types.

Digits to Validate — Enter a number to define how many digits at the beginning of a credit card number to validate. For example, many major credit cards can be recognized by the first four digits. Therefore, the number 4 can be entered in this field.

Numeric On — Enables only numeric data. Clear this check box to enable the numbering system to permit characters of the alphabet.

Print on Check — The ID prints on the guest check.

Validate — Validates the number entered on the order entry terminals against a user-defined list of IDs.

Valid — Indicates whether the user-defined IDs represent valid IDs or invalid IDs.

Authorization Subtab

The Authorization subtab affects the credit card authorization and configures authorization characteristics. Select the Authorization subtab from the Tenders function tab to set up credit card authorization, as shown in Figure 6-5:

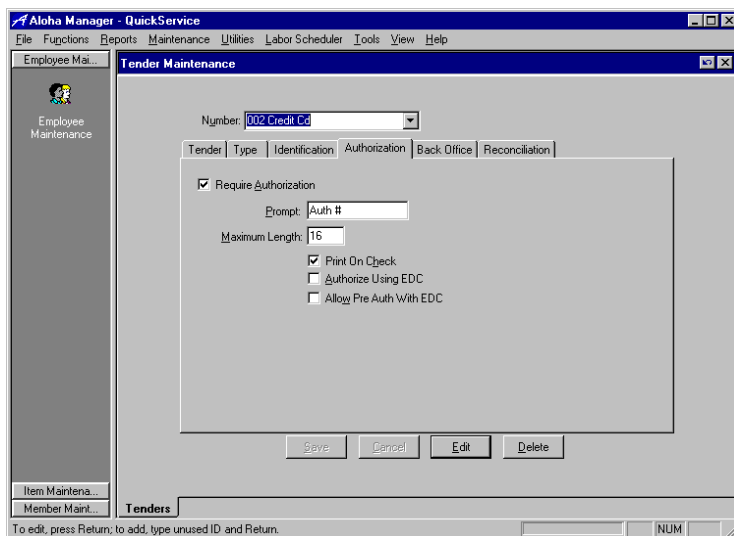


Figure 6-5 Tenders, Authorization Subtab

Require Authorization — Enables an authorization prompt on order entry screens.

Prompt — Text that displays on order entry terminals prompting for the authorization number, such as 'Authorization #'.

Maximum Length — Defines the maximum length of the authorization code for the defined credit card. If the authorization number is greater than zero, a message stating 'Must enter auth code' displays. If the maximum length is set to zero, the system accepts blank authorization codes.

Print on Check — Prints the authorization code on the guest check.

Authorize Using EDC — Specifies Aloha EDC is used for credit card pre-authorization.

Allow PreAuth with EDC — Specifies Aloha EDC is used for credit card pre-authorization.

Back Office Subtab

The Back Office subtab defines Property Management System (PMS), Gift Certificates, Aloha Accounts Receivable, and Delivery settings. Select the Back Office subtab from the Tenders function tab to define PMS, gift certificates, and accounts receivable, as shown in Figure 6-6:

The screenshot shows the 'Aloha Manager - QuickService' application window. The 'Tender Maintenance' subtab is active, and the 'Back Office' subtab is selected. The 'Number' field is set to '021 Pink Card'. The 'Tender' tab is selected, showing the following settings:

- PMS Settings:**
 - ☐ PMS
 - PMS Tender ID: 0
 - PMS Room #:
- Gift Certificates:**
 - ☐ Gift Certificate
- Delivery:**
 - ☐ Use Saved Credit Card
- Accounts Receivables:**
 - ☒ Accounts Receivable
 - ☐ Verify Customer Data
 - ☐ Print Reference on Receipt
 - ☐ Print Balance On Receipt
 - AR Field on Receipt: None (0)

Buttons at the bottom: Save, Cancel, Edit, Delete. A status bar at the bottom indicates 'Is this an Account Receivable tender?' with a 'NUM' field.

Figure 6-6 Tenders, Back Office Subtab

PMS Settings Inset

The following fields and check boxes are used with the PMS Interface add-on.

PMS — Ensures this tender type posts to the property management system, if a property management interface is being used, and PMS Interface is installed.

PMS Tender ID — Determines where the tender amount is posted in PMS.



Refer to the
Interfacing
PMS with Aloha User's
Guide for more informa-
tion on PMS.

PMS Room # — Designates a default room number only if all charges to the tender ID are posted to the same account.

Accounts Receivables Inset

The following fields and check boxes are used with the Aloha Accounts Receivable software interface.

Accounts Receivable — Select this switch if this tender is to be used with the Aloha Accounts Receivable software interface. When this switch is selected, the other accounts receivable settings become available.

Verify Customer Data — Prompts the order entry terminal to verify data when this tender type is used in the FOH.

Print Balance on Receipt — Prints the customer's balance (from Aloha Accounts Receivable) on the receipt when this tender type is used in the FOH.

Print Reference on Receipt — Prints the reference information entered in the FOH when the guest check was closed. This is determined by the Reference Entry text box in Accounts Receivable. Enter 0 to not display a FOH prompt. Enter 1 to display a FOH prompt with an optional entry. Enter 2 to display a FOH prompt with a required entry.

AR Field on Receipt — Enables you to select another field from the customer's accounts receivable information for print on the FOH receipt. The choices are 'None', 'Card Number', 'Phone Number', or 'Company Name'.

Gift Certificates Inset

The following check box is used with the Aloha Gift Certificate software interface.

Gift Certificate — Designates this tender as a gift certificate used with Gift Certificate Manager.

Delivery Inset

The following check box is used with Aloha Delivery Frequent Buyer.



Refer to the
Aloha Gift
Certificate Manager User's
Guide for more informa-
tion on gift certificates.



Refer to the Aloha Delivery/Frequent Buyer User's Guide for more information.

Use Saved Credit Card — Enables the system to store credit card information for customers in a delivery operation.

Reconciliation Subtab

The Reconciliation subtab sets up an over or under amount for tenders used in the Payment Reconciliation function. If any of these are selected, the tender is included in the Payment Reconciliation process. Select the Reconciliation subtab from the Tenders function tab to set up payment reconciliation requirements, as shown in Figure 6-7:

The screenshot shows the 'Aloha Manager - QuickService' application window. The 'Tender Maintenance' subwindow is active, displaying the 'Reconciliation' subtab. The 'Number' field is set to '002 Credit Cd'. The 'Variance' section shows 'Variance Amount Allowed' set to '0.00'. Below this, there are three options: 'Enter Details' (unselected), 'Enter Totals' (selected), and 'Auto Fill' (checked). At the bottom of the subwindow are buttons for 'Save', 'Cancel', 'Edit', and 'Delete'. The main window has a menu bar with 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. The left sidebar shows 'Employee Maintenance' and 'Tenders' (selected). The status bar at the bottom says 'To edit, press Return; to add, type unused ID and Return.' and 'NUM'.

Figure 6-7 Tenders, Reconciliation Subtab



A cash tender with a \$0.00 default value displays the FOH cash screen for entering an amount. If there are no cash tenders defined with a \$0.00 value in 'Default Amt', one must be created for use with Payment Reconciliation.

Variance Amount Allowed — Defines the currency amount this tender can differ when verifying amounts for reconciliation. The variance amount applies to over and under the amount entered for reconciliation.

The system recognizes the variance amount from the first cash tender with \$0.00 defined in the 'Default Amt' text box. Variance settings for all other cash tenders are not necessary and are invalid. If an amount is entered in 'Default Amt' and 'Variance Amount Allowed', the variance amount is ignored and the 'Variance Amount Allowed' text box becomes unavailable after the tender is saved.

Enter Details — Enter transaction detail when running Payment Reconciliation. For example, if the tender is defined as personal checks, each individual check is entered.

Enter Totals — Total amount must be entered when running Payment Reconciliation. For example, if a tender is defined as a Visa credit card, the total amount of all Visa transactions, without itemizing, is entered. This is the default selection.

Auto Fill — Populates all Payment Reconciliation fields without the employee entering the amount. This scenario would be for operations that only verify payments.



If the 'Cash' check box is selected on the Type subtab, 'Enter Details', 'Enter Totals', and 'Auto Fill' are not accessible. These options are ONLY available for non-cash tenders.



Refer to Chapter 5, Menu

Maintenance Functions, for detailed information on using the Panel Editor.



For more details about

the six predefined promotion types, refer to the Promotion Types section in this chapter.

Promotions

Promotions is a comprehensive feature set that allows the configuration of a wide array of promotions to fit every need. There are six different types of promotions. Each one is defined in a separate secondary dialog box specific to the type. These promotions are created in conjunction with the categories defined in Maintenance > Menu > Categories. Promotions are placed on the FOH using the Panel Editor feature accessed in Maintenance > Menu > Panel Editor.

Categories are the cornerstone in the promotions structure, and you must have full understanding of them in order to get the most from the promotions features. Promotions are defined in terms of categories, and depending on the needs of the restaurant, it may be necessary to create special non-sales/non-retail categories just for use in promotions. For example, a rib dinner normally sells for \$8.99, but using a coupon, a discount of \$2.00 can be applied. Items can only belong to one sales category, and if the rib dinner is already included in a sales category, it is recommended that a non-sales category that includes only the rib dinner be created. Select this category when setting up the promotion, therefore, limiting the promotion to only the rib dinner.

Select Maintenance > Payments > Promotions to display the Promotions function tab, shown in Figure 6-8:

Figure 6-8 Promotions

Number — Holds a five-digit number that together with 'Name' uniquely identifies each promotion record. To create a new record, enter an unused promotion ID and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record to edit and press Enter.

The Promotions function tab provides the following subtabs: Promotions, Taxes, and Restrictions.

Promotions Subtab

The Promotions subtab enables you to define the dates of the promotion and the type of the promotion. Individual promotion dialog boxes are accessed from this subtab through the Type Specifics button. Select the Promotions subtab from the Promotion Maintenance function tab to edit and enter information.

Name — Enter a unique name to identify the record.

Type — Select one of six predefined promotion types from the drop-down list. The six types of promotions are as follows:

- **BOGO** — (Buy one get one free) The customer buys an eligible item and receives another item at a discount or free of charge.
- **Combo** — Combines menu items and assigns a special price.
- **Coupon** — Assigns coupon characteristics to a promotion and defines a coupon.
- **New Price** — Assigns a special promotional price to a menu item without affecting prices elsewhere in the Aloha menu system.
- **Check Reduction** — Permits a simple check reduction with either percentage or dollar amount discounts.
- **Quick Combo** — Enables a combination of items to be grouped together for a special price.

Type Specifics Button

Click Type Specifics to access the dialog box specific to the selected type of promotion. For example, if the BOGO promotion type is selected in the 'Type' drop-down list, the BOGO promotion dialog box displays. For a more complete discussion of the available promotion types, refer to the Promotion Types section in this chapter.

Start Date — Enter the day the promotion begins in the mm/dd/yyyy format. It is not necessary to use the four-digit year; the last two digits are sufficient.

End Date — Enter the last valid day of the promotion in the mm/dd/yyyy format. It is not necessary to use the four-digit year; the last two digits are sufficient.

Max Amount — Defines the maximum amount of discount allowable per check.

Report as — Enables you to combine promotions together for reporting purposes. This contains a drop-down list of previously defined promotions.



To report a promotion as itself, save it, then access the promotion and select it from the 'Report as' drop-down list.

Active — Activates the promotion. Promotions can also be triggered by the Event Scheduler, overriding the check box setting.

Print Check — Prints a copy of the guest check when this promotion is used.

Manager Needed — Requires a manager to apply the promotion.

Do Not Show in Promo List — Designates the promo not to show up in the promo dialog box.

Apply Gratuity — Enables the system to apply a gratuity to the selected promotion.

Bar Code Range Values

Using bar codes with your promotions, specifically printed coupons, assists you with the lookup of the promotion, therefore, allowing you to apply the promotion to the guest check very quickly. Use bar code range values to establish a valid range of SKU numbers for the promotion. For example, you can set up a range of coupons with the same restrictions and reductions to apply to the check. The coupon must have a SKU number and bar code label and the lowest and highest values must have the same number of digits. When scanning promotions with a bar code reader, the system reads the SKU number in Maintenance > Menu > Items first, then the promotion SKU number.

Lowest Value — Establishes the lowest number in a range to support a bar code scan for the promotion.

Highest Value — Establishes the highest number in a range to support a bar code scan for the promotion.



To use bar code scanners, access Maintenance > Terminals > Reader and select 'Use Bar Code Scanner' for the terminal with the scanner.

Taxes Subtab

The taxes subtab defines the tax applied to the promotion. Select the Taxes subtab from the Promotion function tab to edit and define taxes on the promotion, as shown in Figure 6-9:

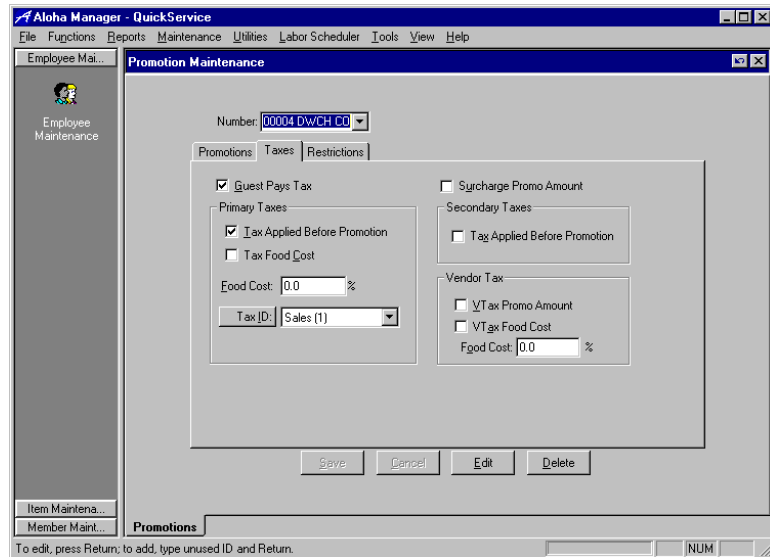


Figure 6-9 Promotions, Taxes Subtab

Guest Pays Tax — Requires the guest to pay the tax on the promotion. If not selected, the restaurant pays the tax.

Surcharge Promo Amount — Applies a surcharge to the promotion amount. Select this check box only if using surcharges. Surcharges are defined and activated in Maintenance > Menu > Surcharges.

Primary Taxes Inset

Tax Applied before Promotion — Applies the appropriate tax to the full amount of the promotion. The tax is calculated on the original item price before applying the promo.

Tax Food Cost — Uses the percentage defined in the 'Food Cost' text box to apply a tax amount on the food cost in the promotion.

Food Cost — Defines a tax percentage (entered as a decimal), to use to calculate an approximate food cost when the 'Tax Food Cost' check box is selected.

Tax ID — Accepts a number corresponding to a tax method previously defined in Maintenance > Menu > Taxes. Some jurisdictions require the restaurant to pay the tax on all promotions. Thus, one way to track promotion tax amounts is to create a special tax method called Promotions > Comps in Maintenance > Menu > Taxes, then enter that tax ID in the Tax ID text box.

Tax ID Button

Click Tax ID to display the Taxes function tab. Here you can perform maintenance in the taxes function, including add new tax records if the tax you need to apply is not already there.

Secondary Taxes Inset

Tax Applied before Promotion — Applies a secondary tax to the promotion amount. The tax is calculated on the original item price before applying the promo.

Vendor Tax Inset

VTax Promo Amount — Applies the vendor tax to the full amount of the promotion.

VTax Food Cost — Uses the percentage defined in the 'Food Cost' text box to apply a vendor tax amount on the food cost in the promotion.

Food Cost — Defines a tax percentage (entered as a decimal), to use to calculate an approximate food cost when the 'Tax Food Cost' check box is selected.

Restrictions Subtab

The Restrictions subtab defines the limitations on the promotion, governs how comp items are handled with the promotion, and how other promotions affect it. Select the Restrictions subtab from the Promotions function tab to define the limitations on the promotion, as shown in Figure 6-10:

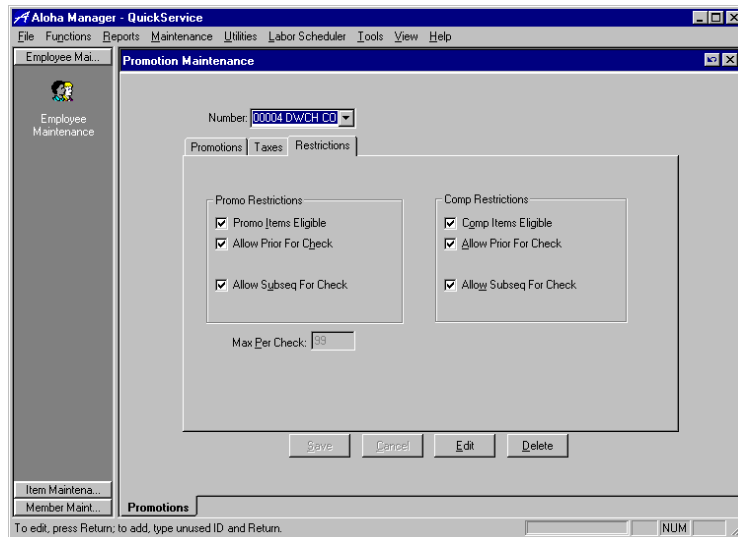


Figure 6-10 Promotions, Restrictions Subtab

Promo Restrictions Inset

Promo Items Eligible — Eligible items already define as promotions are eligible for inclusion in the promotion being defined.

Allow Prior for Check — Allows multiple promotions on the same guest check.

Allow Subseq for Check — Allows subsequent promotions on the check to be eligible for the defined promotion.

Comp Restrictions Inset

Comp Items Eligible — Allows comp items to be eligible for the defined promotion. If comp items are not permitted, this check box should not be selected.

Allow Prior for Check — Allows multiple comps on the same guest check.

Allow Subseq for Check — Allows subsequent comps on the check.

Max per Check — Defines the maximum allowable number of the defined promotions permitted on each guest check. Attempts to apply more promotions than the number specified in 'Max Per Check' result in a warning message on the order entry terminal. This must be at least 1.

Promotion Types

The Promotions subtab defines each promotion as to type and behavior. A specific promotion is defined in a secondary dialog box activated by clicking Type Specifics. To edit an existing promotion select from the Number drop-down list. Each secondary dialog box is specific for each of the six different types of promotions built into the Aloha POS System.



When setting up a promotion, do not include revenue items for discounting. When you attempt to apply a promotion to a revenue item, the FOH error message, 'Comps and Promos cannot be applied to a Revenue Item,' displays.

Buy One Get One Promotion Type (BOGO)

The BOGO promotion type is a buy one get one of equal or lesser value either free or at a discounted price. Chargeable modifiers are included in the calculated cost when determining the lower priced item. For example, buy two large sandwiches at regular price, and receive a small sandwich at the dis-

counted price of \$0.99. Cheese and bacon are the only charged modifiers allowed in the discounted price, as shown in Figure 6-11:

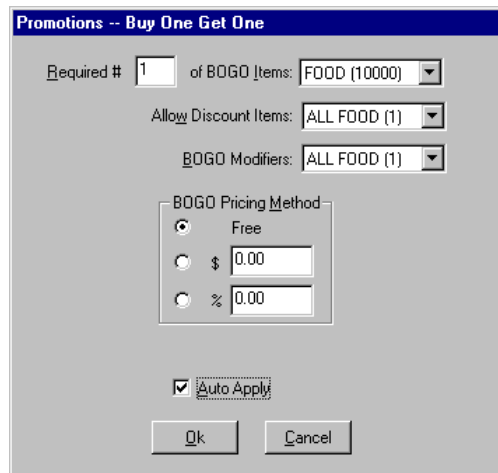


Figure 6-11 Promotion, BOGO

Required # — Specifies the required number of items that must be purchased from the category specified in 'of BOGO Items' before the promotion can be applied.

of BOGO Items — Specifies the category in which items must be purchased for the promotion.

Allow Discount Items — Specifies the category from which a discounted item may be selected.

BOGO Modifiers — Specify a category from which chargeable modifiers are free when the BOGO is applied.

BOGO Pricing Method Inset

Select one of the available pricing methods.

Free — Indicates the second item is sold at no price.

\$ — Indicates the second item is sold at a discounted fixed price.

% — Indicates the second item is sold at a discounted fixed percentage of its original price.

Auto Apply — The FOH automatically applies the BOGO to all eligible items on the check. The Select items prompt does not display. This option disables 'Max Per Check' and 'Max Per Table'.

Combo Promotion Type

The COMBO promotion type combines items from up to 10 categories and assigns a special reduced price to them. For example, if the individual price for the sandwich category is \$2.99, the sides category \$1.99, and the drink category is \$1.29, the order total would be \$6.27. A combo could be created that allows the customer to order an item from each of these categories for a special reduced price of \$5.00. Upon closing the check, the server selects the Combo button, and the system automatically verifies the presence of qualifying menu items on the guest check and applies the combo price, as shown in Figure 6-12:

Category	Min	Max	Category	Min	Max
ALL FOOD (1)	1	4	None (0)	0	0
None (0)	0	0	None (0)	0	0
None (0)	0	0	None (0)	0	0
None (0)	0	0	None (0)	0	0
None (0)	0	0	None (0)	0	0

Figure 6-12 Promotions, Combo



The price of the combo promotion must be less than the total price of the combined items for the combo to be applied.

Combo Check Name — Enter the name of the combo to display on the guest check.

Price — Sets the reduced special price of the combo.

Free Modifiers — Specify a category from which chargeable modifiers are free when the combo is applied.

Category — Up to 10 categories can be included in the combo promotion. Select a category from the drop-down list.

Min — Determines the minimum number of items that can be ordered from the selected category.

Max — Determines the maximum number of items that can be ordered from the selected category. There is no additional charge for the items over the minimum limit.

Coupon Promotion Type

The Coupon promotion type (Figure 6-13) enables a percentage or fixed dollar coupon discount to be applied to a specific category. Restrictions may be established, such as two items must be purchased from a specific category to receive a discount, or the coupon can be applied to only one qualifying item per guest check.

The screenshot shows a dialog box titled "Promotions -- Coupon". It contains the following fields and options:

- Type of Discount:** Radio buttons for "Percentage" and "Dollar Amount" (selected). A text field for "Amount" is set to "1.00".
- Application:** Radio buttons for "User selects each qualified item" and "System selects all qualified items" (selected).
- Items Available:** A dropdown menu showing "FOOD (10000)".
- COUPON Modifiers:** A dropdown menu showing "None (0)".
- Req'd Items:** A dropdown menu showing "FOOD (10000)".
- Minimum Items:** A text field set to "1".
- Distribution:** Radio buttons for "Distribute discount across items" and "Apply discount to each item" (selected).
- Item Limit:** A text field set to "4".

At the bottom are "Ok" and "Cancel" buttons.

Figure 6-13 Promotions, Coupon

Type of Discount Inset

Percentage — Defines the coupon discount as a percentage.

Dollar Amount — Defines the coupon discount as a fixed dollar amount.

Amount — Treats the value as a percentage for percentage coupons, and as a dollar amount for dollar amount coupons. Percentages are entered as decimals, such as 0.50 for 50%. 100% (free) is entered as 1.00. Specify the percentage or fixed dollar amount in the text box. A dollar amount entered here establishes a maximum amount, to prevent the discount from exceeding a certain amount. For example, if a customer purchases two entrees, they may receive a dessert free. However, if the amount specified is \$3.00, the customer must pay the difference if the price of the dessert is more than \$3.00.

Application Inset

User selects each qualified item — Enables the person entering the customer order to select the items that qualify for the promotion.

System selects all qualified items — Causes the system to select items from the order that qualify for the promotion.

Distribution Inset

Distribute discount across items — Distributes the discount across each item that qualifies for the discount. The system prompts you to select qualifying items. Only items specified in 'Req'd Items' display for selection. Two items that qualify for a \$1.00 discount would each be discounted by 50¢.

Apply discount to each item — Applies the discount to each item that qualifies for the discount. The system prompts you to select qualifying items. Only items specified in 'Req'd Items' display for selection. Two items that qualify for a \$1.00 discount would each be discounted \$1.00.

General Settings

Items Available — Select a category of eligible menu items for the discount. Any category previously defined in Maintenance > Menu > Categories can be selected.

COUPON Modifiers — Specify a category from which chargeable modifiers are free when the coupon is applied.

Req'd Items — Specifies the category in which a purchase must be made in order to qualify for the discount. The quantity that must be purchased is determined by the value entered in 'Minimum Items Req'd'.

Minimum Items Req'd — Used to set up promotions that require the purchase of an item from a particular category to receive a discount on an item from either another category or the same category. This text box specifies the number of items that must be purchased from the 'Req'd Items' category.

Item Limit — When the 'Discount Off Selected Items Only' check box is selected, this determines the maximum number of eligible items that can be selected at any one time from the Select items prompt when applying the promotion. If more items are selected than the number specified here, an error message displays.

If Item Limit is set to zero, the FOH automatically applies the discount to all eligible items on the check, therefore, the 'Select items' prompt does not display. If the number of eligible items on the guest check is less than the item limit, the FOH automatically applies the coupon. If it is more, the items must be chosen from the 'Select items' prompt.



If 'Item Limit' is set to zero or the number of eligible items on the check is less than the item limit, the system automatically selects the items for you when this combo is applied on the FOH terminal. If the selection dialog should be displayed instead, enter an item limit of 1, and enter more than one item on the check.

For example, the promotion states buy any entree for 10% off. If the guest check has three entrees for \$10.00 each, the discount is calculated based on 10% of \$30.00 and a \$3.00 discount is applied to the check.

If the promotion states buy one entree and get \$2.00 off, and the guest check has three entrees for \$10.00 each, the discount is applied to each entree individually, creating three entries on the guest check for \$2.00 each. However, if 'Max Per Check' is set to 2, the discount can be applied to 2 entrees only for a maximum discount of \$4.00.

New Price Promotion Type

The New Price promotion assigns a special promotional price to menu items without affecting prices elsewhere in the system. For example, an entree that normally sells for \$12.50 can be purchased for \$9.50 with the New Price promotion. This type of promotion is different in that it sets the price for the item as opposed to calculating a new price based on a percentage or dollar amount discount. It is also different in that the item(s) eligible for discount are specified instead of allowing the discount to be applied to any item in a particular category.

Restrictions can be placed on the promotion. For example, the customer may have to purchase two entrees to receive a dessert that normally sells for \$5.50 at a discounted price of \$4.00. An example of a new price promotion is shown in Figure 6-14:

Promotions -- New Price

Minimum Required: 3

Required Items: ALL FOOD (1)

Maximum Allowed: 4

Free Modifiers: None (0)

Item	New Price	Item	New Price
Dbl Big One Chev	2.99	None (0)	0.00
None (0)	0.00	None (0)	0.00
None (0)	0.00	None (0)	0.00
None (0)	0.00	None (0)	0.00
None (0)	0.00	None (0)	0.00

☒ Auto Apply

Ok

Cancel

Figure 6-14 Promotions, New Price

Minimum Required — Used in conjunction with 'Required Items' to set up New Price promotions requiring the purchase of an item from a particular category to receive a discounted price on the item(s) specified in 'Item'. This check box specifies the number of items that must be purchased from the 'Required Items' category.

Required Items — Specifies the category in which a purchase must be made in order to qualify for the item discount. The quantity that must be purchased is determined by the value entered in 'Minimum Required'.

Maximum Allowed — Sets the number of promo types that can be applied to the same guest check. For example, if this is set to 1, only the New Price promotion can be applied to the guest check. No other promotion, such as buy an entree, get a dessert free, can be applied to the same guest check.

Free Modifiers — Specify a category from which chargeable modifiers are free when the New Price Promotion is applied.

Item — Select up to 10 individual menu items from the Items database file for each New Price promotion.

New Price — Enter the price to use for the item when the promotion is applied to a guest check.

Auto Apply — The FOH automatically applies the New Price promotion to all eligible items on the check. The Select items prompt does not display. This option disables 'Max Per Check' and 'Max Per Table'.

Check Reduction Promotion Type

The Check Reduction promotion permits a guest check to be discounted either by a percentage or a dollar amount. Restrictions, such as a minimum amount for the guest check, can be placed on the promotion. For example, the guest check total must be at least \$50.00 for the customer to receive a 10% discount.

The discount can also be restricted to items from a particular category, or it can apply to all items on the guest check, as shown in Figure 6-15:

The screenshot shows a dialog box titled "Promotions -- Check Reduction". It features a "Check Minimum" field set to 8.00. A "Qualify" checkbox is checked. Below this, there are two dropdown menus: "Items" and "Qualifying Items", both currently set to "FOOD (10000)". A "Reduce by" section contains two radio buttons: "Percentage" (which is selected) and "Amount" (which has a text box next to it containing the value 10). At the bottom of the dialog are "Ok" and "Cancel" buttons.

Figure 6-15 Promotions, Check Reduction

Check Minimum — Specifies the minimum amount for the guest check before the Check Reduction promotion can be applied. If 'Qualify' is selected, a 'Qualifying Items' category must be selected and 'Check Minimum' pertains to the total value of the items ordered from that category. This total must be greater than the amount specified in 'Check Minimum' before the promotion can be applied to items purchased from the category specified in 'Items'.

Items — Specifies the category containing the items that are discounted when the promotion is applied.

Qualify — Works in conjunction with the 'Qualifying Items' category and the 'Check Minimum' text box to place a restriction on the promotion. If the item total is less than the minimum amount, the promotion cannot be applied.

Qualifying Items — Works in conjunction with the 'Qualify' check box and specifies the category to include or exclude when determining if the promotion is still valid.

Use the following table to achieve the desired results:

Qualify	Qualifying Items	Result
Selected	Selected Category	Compares the amount specified in 'Check Minimum' to the total amount of all ordered items in the 'Qualifying Items' category to determine if you can apply the promotion.
Cleared	Selected Category	Compares the amount specified in 'Check Minimum' to the total amount of all ordered items not in the 'Qualifying Items' category to determine if you can apply the promotion

Reduce by Inset

Percentage — Reduces the check by a percentage. Enter the percentage in the 'Amount' text box.



Do not select 'Percentage' if the guest check should be reduced by a fixed dollar amount.

Amount — Treats the value as a percentage for percentage coupons, and as a dollar amount for fixed value coupons. Percentages are entered as decimals, such as 0.50 for 50%. 100% (free) is entered as 1.00.

Quick Combo Promotion Type

The Quick Combo promotion type requires a combination of items to be grouped together for a special price. Up to ten items can be combined. For instance, a burger, an order of fries, and a drink may be combined and

Only Print Combo Name on Guest Check? — Causes the system to print the name of the combo on the guest check, omitting item details about the discounts involved.

Consolidate Like Components? — Causes the system to group identical items together on the order and on the guest check.

Num Required Components (2 - 5) — Enter a number between 2 and 5 for the required number of components that must be purchased for the defined Quick Combo.

Update — Select the component and enter its requirements in the Component Inset.

For example, select Component #1 and then enter the name of the component such as 'hamburger', 'fry', or 'drink'. The number entered in 'Num Required Components (2-5)' determines the number of available choices.

Component Name — Enter a name to assign to the component, such as Sandwich, Side, or Drink.

Exclude — Excludes the component from discounting calculations. This applies the total discount to only the components not marked with 'Exclude' in the promotion. If the price of the discounted amount is greater than the full price of the components not marked with 'Exclude', then you can not apply the promotion.

Regular Item — Select the item for the quick combo from the drop down list. The drop down list contains all items in the item record. To select an item click the component in the 'Update' field and choose the desired item from the drop down list. 15 Lines are available for defining qualifying items.

Upsell Item — Select the upsell item from the drop down list. For example, if the quick combo contains a medium drink, the upsell item is a large drink.

Surcharge — Enter an amount for a modifier charge if applicable on the upsell item. For example, a hamburger combo meal comes with a drink and fries. The upsell items would increase the fries and drink to a large fry and large drink. If a milk shake is sold with the combo an additional charge of \$1.00 would be added.

Comps

Comps is an extensive feature that allows the definition and configuration of a wide array of comps for use in the Aloha POS system. Comps are created using the dialog boxes in conjunction with the categories defined in Maintenance > Menu > Categories. Comps are placed on the FOH using the Panel Editor feature accessed in Maintenance > Menu > Panel Editor.

Categories are an important part of comps. A full understanding of categories is important in order to get the most from the Comps feature. Comps are often defined in terms of a category, and depending on the needs of the restaurant, it may be necessary to create special non-sales/non-retail categories just for use in comps.



When setting up a comp, do not include revenue items for discounting. When you attempt to apply a comp to a revenue item, the FOH error message, 'Comps and Promos cannot be applied to a Revenue Item,' displays.



Refer to Chapter 5, Menu Maintenance Functions, for more information on using the Panel Editor.

Select Maintenance > Payments > Comps to display the Comps function tab, as shown in Figure 6-17:

Figure 6-17 Comps

Number — Holds a three-digit number that together with 'Name' identifies each comp. To create a new comp, enter an unused number and press Enter. To edit an existing record, scroll through the Number drop-down list, select the comp to edit and press Enter.

The Comps function tab provides the following subtabs: Comps, Taxes, and Restrictions.

Comps Subtab

The Comps subtab allows you to define the name, button position, and the items eligible for comps. Select the Comps subtab from the Comp function tab to edit or enter a comp.

Name — Enter a descriptive name to identify the comp.

Check — Descriptive name that prints on the guest check when the comp is used.

Percent Off — Sets the percentage to be discounted when the comp is applied. Type the percentage and press Enter. For example, to set this to 50%, type 50 and press Enter. It is converted to decimals for you (50.0000). If the comp is a dollar amount, set this to zero.

Maximum \$ — Establishes a maximum dollar amount that can be discounted. If 'Must Enter Amount' is not selected, the item(s) to comp must be selected when the comp is applied. Neither the item total or the entered amount can be more than the amount specified here. For example, if the comp is defined as 100% but 'Maximum \$' is set to \$5.00, the customer is responsible for the balance if the item total is more than \$5.00.

Eligible Items — Select a category for the comp from the drop-down list. The categories are created in Maintenance > Menu > Categories. This can be any of the standard categories, such as Sales or Retail, or any Non-Sales/Non-Retail Category created specifically for comp purposes.

Eligible Items Button

Click Eligible Items to access the Categories function tab. Here you can perform maintenance on existing categories, including add new categories if a new category is needed.

Report as — Enables you to combine comps together for reporting purposes. This contains a drop-down list of previously defined comps.



To report a comp as itself, save it, then access the comp and select it from the 'Report as' drop-down list.

Active — Makes the comp active. Comps can also be triggered by the Event Scheduler. Refer to Events for more information on how to schedule events.

Print Check — Prints a copy of the guest check when the check is closed.

Open Drawer — Enables the cash drawer to open when the comp is applied.

Manager Needed — Requires a manager to apply the comp.

Apply Gratuity — Enables the system to apply a gratuity to the selected comp.

Must Select Items — Requires menu items be explicitly selected to apply the comp on order entry terminals.

Must Enter Unit — Prompts for a unit number at the order entry terminals. This is useful for multi-store operations which accept employee comps from other locations.

Must Enter Name — Prompts for a name at the order entry terminal. This is often used to track who is receiving employee comps.

Use Mag Card Only — Requires an employee receiving a comp to use his or her mag card instead of entering the number manually. You must select 'Must Use Name' to enable this setting.

Must Enter Amount — Prompts for the comp amount at the order entry terminal. Used for non-percentage comps.

Must Enter Percent — Used to set up a comp where the FOH prompts for a percentage to entered instead of the comp being a fixed percent.



Dollar Amount comps cannot be set as a fixed amount. Select ‘Must Enter Amount’ and the FOH prompts for the amount when the comp is applied. The system does not allow you to save a comp unless a rate is entered, or ‘Must Enter Amount’ or ‘Must Enter Percent’ is selected.

Taxes Subtab

The taxes subtab defines the Primary Taxes, Secondary Taxes, and Vendor Taxes. These tax types and amounts must first be defined in Maintenance > Menu > Taxes, and applied to the menu items in Maintenance > Menu > Items contained in the target category for the comp. Select the Taxes subtab from the Comp function tab to edit and define the taxes on a comp, as shown in Figure 6-18:

The screenshot shows the 'Comp Maintenance' window in the 'Aloha Manager - QuickService' application. The 'Number' field is set to '001 10 %'. The 'Taxes' subtab is selected, displaying various tax configuration options. The 'Primary Taxes' section includes checkboxes for 'Tax Comp Amount' and 'Tax Food Cost', with a 'Food Cost' field set to '0.0 %'. The 'Secondary Taxes' section has a checkbox for 'Tax Comp Amount'. The 'Vendor Taxes' section includes checkboxes for 'Tax Comp Amount' and 'Tax Food Cost', with a 'Food Cost' field set to '0.0 %'. At the bottom, there are buttons for 'Save', 'Cancel', 'Edit', and 'Delete'. The status bar at the bottom indicates 'To edit, press Return; to add, type unused ID and Return.' and shows 'NUM'.

Figure 6-18 Comps, Taxes Subtab

Guest Pays Tax — Requires the guest to pay the tax on the comp. If not selected, the restaurant pays the tax.

Surcharge Comp Amount — Applies a surcharge to the comp amount. Select this check box only if using surcharges. Surcharges are defined and activated in Maintenance > Menu > Surcharges.

Primary Taxes Inset

Tax Comp Amount — Applies the appropriate tax to the full amount of the comp.

Tax Food Cost — Uses the percentage defined in the 'Food Cost' text box to apply a tax amount on the food cost in the comp.

Food Cost — Defines a tax percentage (entered as a decimal), to use to calculate an approximate food cost when the 'Tax Food Cost' check box is selected.

Tax ID — Accepts a number corresponding to a tax method previously defined in Maintenance > Menu > Taxes. Some jurisdictions require the restaurant to pay the tax on all comps. Thus, one way to track comp tax amounts is to create a special tax method called Promotions > Comps, then enter that tax ID in the Tax ID text box.

Tax ID Button

Click Tax ID to display the Taxes function tab. Here you can perform maintenance in the taxes function, including add new tax records if the tax you need to apply is not already there.

Secondary Taxes Inset

Tax Comp Amount — Applies a secondary tax to the amount of the comp.

Vendor Tax

Tax Comp Amount — Applies the vendor tax to the full amount of the comp.

Tax Food Cost — Uses the percentage defined in the Food Cost text box to apply a vendor tax amount to a calculated food cost only.

Food Cost — Defines a tax percentage (entered as a decimal), to use to calculate an approximate food cost when the 'VTax Food Cost' check box is selected.

Restrictions Subtab

The Restrictions subtab defines the limitations on the comp. Select the Restrictions subtab from the Comps function tab to define the limitations, as shown in Figure 6-19:

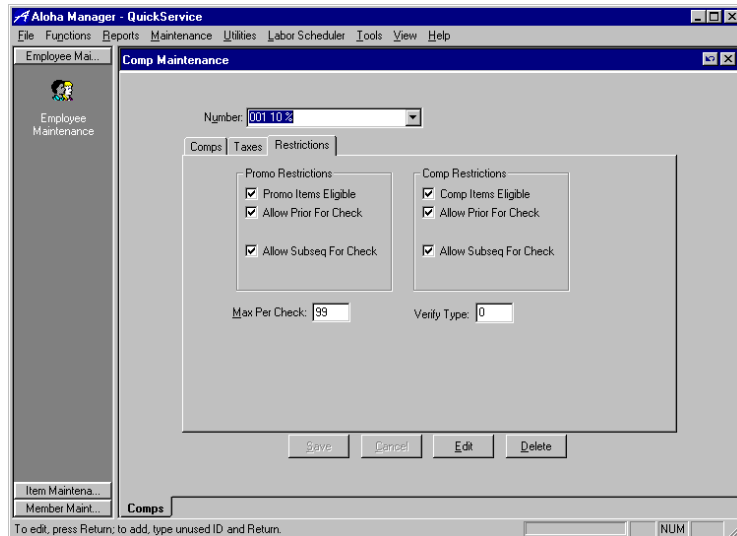


Figure 6-19 Comps, Restrictions Subtab

Promo Restrictions Inset

Promo Items Eligible — Eligible items already defined as promotions are eligible for inclusion in the promotion being defined.

Allow Prior for Check — Allows multiple promotions on the same guest check.

Allow Subseq for Check — Allows subsequent promotions on the check to be eligible for the defined promotion.

Comp Restrictions Inset

Comp Items Eligible — Allows comp items to be eligible for the defined promotion.

Allow Prior for Check — Allows multiple comps on the same guest check.

Allow Subseq for Check — Allows subsequent comps on the check for the defined promotion.

Max per Check — Defines the maximum allowable number of the defined promotions permitted on each guest check. Attempts to apply more promotions than the number specified in 'Max Per Check' result in a warning message on the order entry terminal. This must be at least 1.

Verify Type — Enables the user to assign a number between 1 and 3 to validate an employee comp. This field requires a file titled COMPVER.TXT in ALOHAQS\DATA with the following requirements in the text document:

- Employee Number in positions 1-10
- Employee First Name in positions 11-25
- Employee Last Name in positions 26-41
- Comp Type in position 42

The system validates the employee number against COMPVER.TXT. The 'Must Enter Name' check box must be selected on the Comps subtab. When the comp is selected on the FOH screen it requests a name and validates it with the COMPVER.TXT file. This feature enables you to assign employees three levels of comps. For example, an employee with 1 year of employment can be given a 50% discount; whereas an employee with 1 month of employment can be given a 10% discount.

House Accounts

The Aloha POS system enables the definition of house accounts and treats them as accounts receivable within the system, when coupled with a correctly defined house account tender type in Maintenance > Payments > Tenders.

When a house account payment is tendered on the FOH, the system asks for the account. The account number entered must match either the account number or account name of a valid house account or the payment is rejected.

Select Maintenance > Payments > House Accounts to display the House Account function tab, as shown in Figure 6-20:

The screenshot shows the 'House Account Maintenance' window in the Aloha Manager - QuickService application. The window has a menu bar with 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. On the left is a sidebar with 'Employee Maintenance' and 'House Accounts' tabs. The main area contains the following fields:

- Account #: 00012 (dropdown)
- Account Name: ALEX
- Name:
 - First: Alexander
 - Middle: R.
 - Last: Montoya
- Telephone: 817-252-9499
- Address: 1320 Tennis Dr.
- City / Town: Bedford
- State: TX
- Postal Code: 76122
- ☐ Inactive

At the bottom are buttons for 'Save', 'Cancel', 'Edit', and 'Delete'. A status bar at the very bottom says 'To edit, press Return; to add, type unused ID and Return.' and has a 'NUM' button.

Figure 6-20 House Accounts

Account # — Holds a five-digit number that together with 'Name' uniquely identifies each house account. To create a new record, enter an unused account ID and press Enter. To edit an existing record, scroll through the Account # drop-down list and select the record to edit.

Account Name — Enter a name to uniquely identify the account number.

Inactive — Deactivates the account.

Name and Address Insets

The House Account function tab contains insets for entering standard name and address information, with an additional text box for a telephone number. Unlike most other database files within the Aloha POS system, the House Account file does not depend on other files within the system, thus there are no drop-down selection lists in the dialog box.

Type information into the text boxes in the insets per your company policies. Click Save when finished.

Foreign Currencies

The Foreign Currencies function is used to set up foreign currencies as a method of payment at a restaurant location. Using this feature, when the FOH presses the corresponding tender button for the foreign currency, the exchange rate is converted and displayed on screen. Using the numeric keypad, the server enters the amount received from the customer and presses OK. The amount is converted to the local currency equivalent. The name of the foreign currency, its exchange rate, the amount tendered, and the corresponding amount in local currency displays on the guest check. If the amount entered does not equal the amount of the check, the change amount or balance due amount also displays (in local currency).

Select Maintenance > Labor > Foreign Currencies to display the Foreign Currency function tab, shown in Figure 6-21:

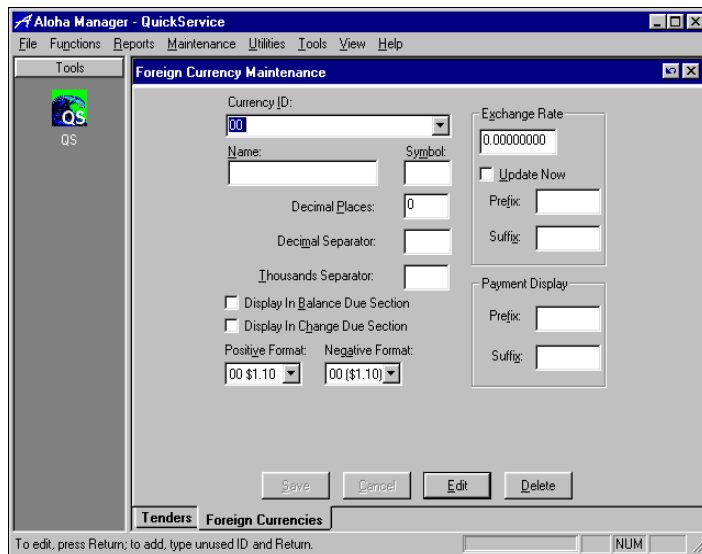


Figure 6-21 Foreign Currencies



Foreign payment displays on guest checks, pole displays, and other peripheral devices that display foreign payment, as follows:

Name	Exchange Rate	Foreign Amt	Local Equivalent
Pound	1.65	£8.00	\$4.85

Currency ID — Holds a five-digit number that together with 'Name' uniquely identifies each foreign currency record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Currency ID field drop-down list, select the record to edit and press Enter.

Name — Enter a descriptive name to match the Currency ID field.

Symbol — Represents the symbol that displays on the FOH when the corresponding tender is selected. Sometimes it is necessary to cut and paste the symbol from another application such as the Character Map located in Windows.

Decimal Places — Designates the number of digits to the right of the decimal point. Although two is the standard for North America, many nations require three digits to the right of the decimal.

Decimal Separator — Separates whole values from fractional values. If custom dictates that the separator is a comma, enter a comma in this field.

Thousands Separator — Accepts the customary character that is used to separate numbers in thousands. North American custom is to use a comma as the thousands separator, however, European custom is to use a period. Refer to Maintenance > Payments > Tenders for information on setting up tender types and tender buttons for foreign currencies.

Display in Balance Due Section — Forces the foreign currency to always be displayed along with the local currency on the Balance Due screen in the FOH.

Display in Change Due Section — Displays the foreign currency along with the local currency on the Change Due screen in the FOH. If the 'Display in Change Due Section' check box is not selected for a particular currency, that currency still displays change due when it has a payment on a guest check.

Positive Format — Select the format used to display currency in positive numbers. For example, using the format '00- \$1.1', all currency with a value of one or greater displays as a positive number, followed by a decimal (or decimals).

Negative Format — Selects the format used to display currency in negative numbers. For example, using the format '01- \$1.1', all currency with a value less than zero displays as a negative number, followed by a decimal (or decimals).

Exchange Rate Inset

Exchange Rate — Determines the multiplier used to convert between the local currency and the foreign currency (Exchange Rate) and should be monitored regularly. It is very important to understand the direction of the currency exchange when entering the rate in this box because the inverse of that rate is the exchange in the opposite direction.

To ensure the correct 'direction', ask yourself which currency has a greater value, then use this logic: If the foreign currency has a higher value than the local currency, then the exchange rate must be greater than 1.00. If the foreign currency has a lower value than the local currency, then the exchange rate must be less than 1.00.

Update Now — Immediately updates the FOH with information for existing currencies. However, new currencies are not updated in the FOH until exiting the Maintenance program and performing a real time update, or during a System Refresh.

Prefix — Specifies the characters to precede the exchange rate on checks.

Suffix — Specifies the characters to follow the exchange rate on checks.

Payment Display Inset

Prefix — Specifies the characters to precede a payment on checks.

Suffix — Specifies the characters to follow a payment on checks.



System Maintenance Functions

This chapter discusses the features that relate to adding and creating events, order modes, revenue centers, and tables, and defining void reasons, no sale reasons, and petty cash accounts.

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Chapter 7

Aloha®

The features available on the System menu provide considerable control over the configuration of the restaurant. Many functions relevant to the order process, the organization of the business day, and the grouping of income sources for report purposes are available on the System menu. Petty accounts can be defined and configured from the System menu. Reasons for voided sales and no-sale activities are defined on the System menu as well.

Select Maintenance > System to access the System options, as shown in Figure 7-1:

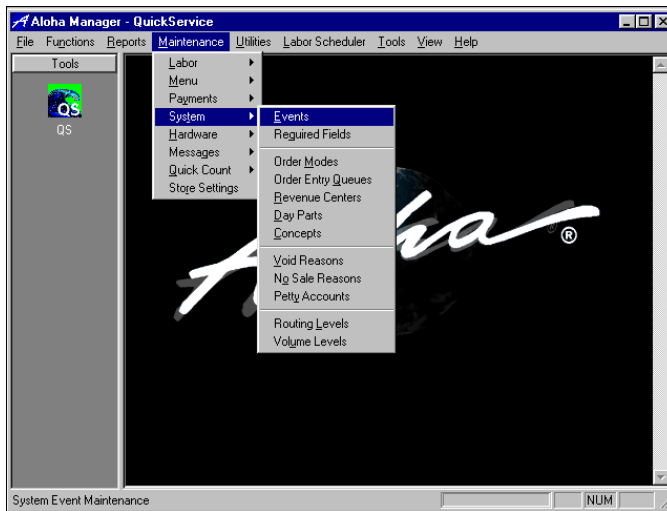


Figure 7-1 System Menu

In this chapter you learn how to:

- Add and configure Events, a powerful tool used to automatically activate menus, reroute printers, activate messages on order entry terminals, activate comps and promos, and many other activities necessary for a restaurant operation.
- Define required fields for data entry, such as for Employee maintenance.
- Define required order modes, such as To Go, Dine In, etc.
- Define order entry queues.

- Define the different revenue centers in the restaurant so that income from the different areas can be summarized.
- Define day parts, which are used to divide the day into time blocks. Day parts help to organize business data for reporting.
- Establish void reasons that are used to define why an item is voided, and whether or not the void affects inventory.
- Establish no sale reasons that are trapped in an audit report each time a cash drawer is opened without the entry of a sale.
- Create petty cash accounts for tracking petty cash transactions.
- Establish routing levels to route items waiting in queues from one place to another within the restaurant in a controlled manner.

Events

Adding and configuring Events provides a powerful tool that permits the automation of many of the event scheduling procedures that are normal for restaurant operations. Configure Events to automatically activate menus, reroute printers and remote display systems, activate messages, restrict order modes by job codes, or many other activities that are set as 'Active' in the database file record.

Select Maintenance > System > Events to display the Events function tab, as shown in Figure 7-2:

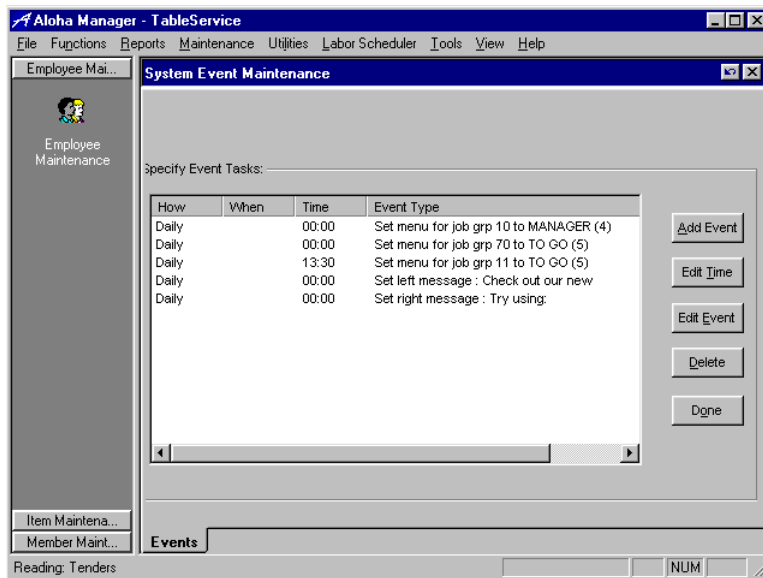


Figure 7-2 System Event Maintenance Function Tab

These events display in reverse order of their hierarchical relationship to the system. Each item on the list overrides all similar items above it in the list. For example, if two events are on the list that relate to price changes, the system encounters the first one as it reads the list and makes it the active event. The system reads the remainder of the list and finds the second event. If the second event affects the same items, but differs with regard to scheduling from the first event, the system makes the second event active when the scheduled time is due for the second event.

It is also important to note that the system will not permit you to add a pair of events in reverse order with regard to scheduling. For example, you may want to add one event that sets the price of an item at all times, and another event that sets the price differently for just a few hours during the day. If you add the event scheduling the price for just a few hours, and then add the event that establishes the price as it will be at all times, the two events display on the event list in time order rather than the order in which they were added. This apparent reversal of order is due to the hierarchy established by the scheduled times for the two events.

Button Functions

You can add, edit, and delete events using button functions located on the side of the function tab.

Add Event Button

Click Add to add a new event. It opens the Event Time and Type secondary dialog box. After you select an event type and click OK, a secondary dialog box opens that is specific to the type of event selected (except for EOD). In most cases, the new dialog box prompts for data specific to the event type (see Programmed Event Types). To add the event, click OK. To cancel the addition, click Cancel.

Edit Time Button

Click Edit Time to change the time of an event. It opens the Event Time and Type secondary dialog box.

Edit Event Button

Click Edit Event to change an event. It opens a secondary dialog box specific to each type of event in the system.

Delete Button

Click Delete to delete an event.

Done Button

Click Done to save the changes and closes the Events subtab. Select after adding a new event or editing an existing event.

Add New Events

Select Add Event in the Events function tab to open the Event Time & Type dialog box, as shown in Figure 7-3:

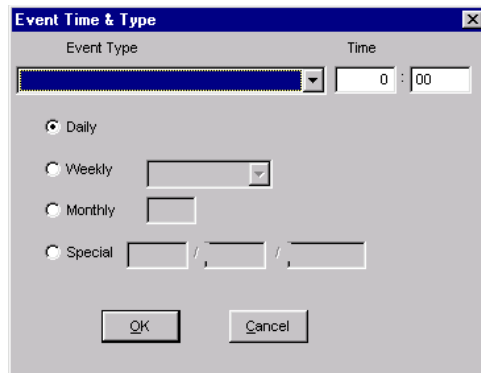


Figure 7-3 Event Time & Type Dialog Box

Event Type — Specifies the type of event. There are approximately 40 event types available in the drop-down list. These are described in detail in the Programmed Event Types section in this chapter.

Time — Specifies the start time for the event. Enter the time in hours and minutes using a 36-hour clock. When using a 36-hour clock, the date of business is extended by 12 hours so that events are accounted for during the same date of business. For example, assume the date of business is 01/01/2000. After midnight, the date of business remains 01/01/2000, but the system date becomes 01/02/2000. The date of business remains 01/01/2000 until the End-of-Day procedure runs, which is typically 4:00 a.m. the following day. To ensure the day's information is posted to the corresponding date of business (01/01/2000), the EOD Event is set to run at 28:00. A time after midnight is specified by adding 24 to the hour, therefore, 28:00 is the equivalent of 4:00 a.m. the following day. When the EOD has completed successfully, the date of business is changed and once again coincides with the system date.



The date is recognized by the FOH. If the FOH date and time is not in sync with the BOH, events do not fire correctly.

There are four selections available in this dialog box that are exclusive to each other; only one selection is permitted for a given event. These selections display in reverse order of their hierarchical relationship to the system. Each item on the list overrides all items above it in the list.

Daily — Sets the event to happen every day at the specified time.

Weekly — Activates the Weekly drop-down list containing the days of the week. Weekly events override daily events.

Monthly — Activates the Month text box, which accepts the day of the month in which the event should be activated. Monthly events override weekly and daily events.

Special — Enter the date in MM/DD/YYYY format. Special events override monthly, weekly, and daily events.

Other daily events can override a previous daily event. For example, on Monday through Saturday, breakfast is fired at 8 A.M., lunch at 11 A.M., and dinner at 4 P.M.

Daily Events

1. 8 A.M. Breakfast
2. 11 A.M. Lunch
3. 4 P.M. Dinner

On Sunday, there is a brunch from 8 A.M. to 3:59 P.M. A weekly event needs to be fired to override the weekly events, however, the daily event will still fire on time because of the hierarchy. Select a weekly brunch event for Sunday, and schedule the event for the same time specified as the daily menu change. Schedule another event to override the firing of the regular daily event at 11 A.M.

Daily Sunday Brunch

1. 8 A.M. Brunch
2. 11 A.M. Brunch
3. 4 P.M. Dinner

If the second event was not added, the 8:00 A.M. Brunch event would fire, but revert back to the daily 11:00 Lunch event. In the example given, the Brunch event runs up to 3:59 P.M., then the regular Dinner event fires as usual.

When events fire for their scheduled time, they end when the End-of-Day occurs and a new business day starts, thus reverting back to normal operations. If scheduled for daily, the event fires at the same time every day. If a time is not specified for an event, the event is active at all times. If the event activates a feature, another event can be scheduled to disable the feature.

Programmed Event Types

Event Types found in the System Event Maintenance subtab are defined as part of the Aloha system and are not created by the user. The Event definitions currently provided are:

(5) Reroute Printer

The Reroute Printer event reroutes a printer to another printer. Use this event for such things as moving item printing to another printer when a station is closed down. The dialog box shown in Figure 7-4 displays:

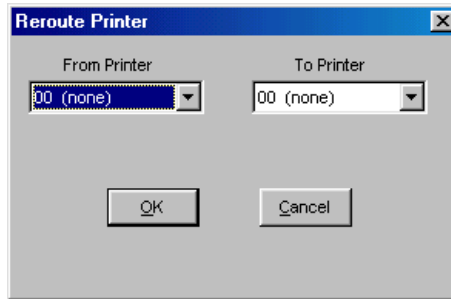


Figure 7-4 Reroute Printer

From and To Printer — Select the printer rerouting from and the target printer, as defined in Maintenance > Hardware > Printers.

(6) Reroute Printer Group

The Reroute Printer Group event reroutes a specific printer group to another printer group. Use this event for such things as moving item printing normally printed from one printer group, to another printer group when a station is closed down. The dialog box shown in Figure 7-5 displays:

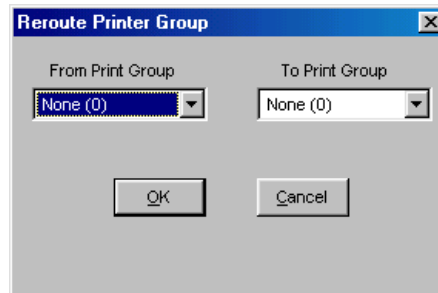


Figure 7-5 Reroute Printer Group Dialog Box

From and To Printer Group — Select the printer group rerouting from and the target printer group, as defined in Maintenance > Hardware > Printer Groups.

(8) End of Day

The End of Day event schedules the End-of-Day procedure. Use this event to start a new business day at a particular time. The time should be defined during a slow time of operation, such as during the time when the establishment is closed. The event is added to the schedule in the Event Time & Type dialog box (Figure 7-3).



The Aloha system runs on a 36-hour clock. For example, to run End-of-Day at 4 a.m., the event time needs to be set to 28:00.

(10) Reroute Print by Terminal

The Reroute Print by Terminal event reroutes printing for a specific terminal. The dialog box shown in Figure 7-6 displays:

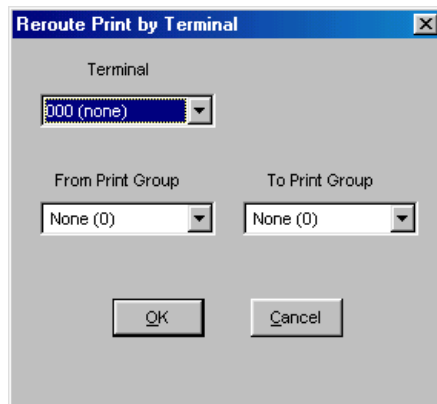


Figure 7-6 Reroute Print by Terminal

Terminal — Select the terminal as defined in Maintenance > Hardware > Terminals.

From and To Print Group — Select the printer group rerouted from and the target printer group, as defined in Maintenance > Hardware > Printer Groups.

(11) Set Left Message

The Set Left Message event activates a message to display on the left side of the log on screen of order entry terminals. Use this event to activate special messages, such as holiday greetings, new specials, and more. The dialog box, as shown in Figure 7-7 displays:



Figure 7-7 Activate Left Message

ID — Specifies the message, as defined in Maintenance > Messages > Main Screen.

Message — Displays the message selected in the 'ID' drop-down list. This message cannot be edited in Events.

(12) Set Right Message

The Set Right Message event activates a message to display on the right side of the log on screen of order entry terminals. Use this event to activate special messages, such as holiday greetings, new specials, and more. The dialog box Figure 7-8 displays:



Figure 7-8 Activate Right Message

ID — Select the message, as defined in Maintenance > Messages > Main Screen.

Message — Displays the message selected from the 'ID' drop-down list. This message cannot be edited in Events.

(13) Activate Promo

The Activate Promo event activates and disables a specific promotion. Use this event when a promotion is not available at a certain time such as a Friday night meal, and add an additional event to re-activate the promotion. To disable a promotion, add the event and DO NOT select the 'Active' check box. The dialog box shown in Figure 7-9 displays:

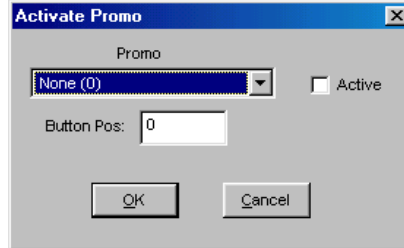


Figure 7-9 Activate Promo

Promo — Select the promo, as defined in Maintenance > Payments > Promotions.

Button Pos — Enter the button position for the promo.

Active — Activates the promo when selected, or disables when cleared.

(14) Activate Comp

The Activate Comp event activates and disables a specific comp. Use this event when a comp is not available at a certain time, and add an additional

event to re-activate the comp. To disable a comp, add the event and DO NOT select the 'Active' check box. The dialog box shown in Figure 7-10 displays:

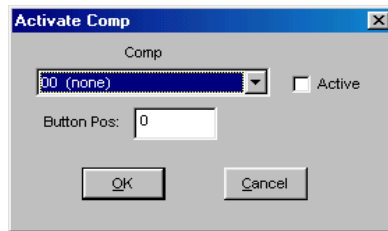


Figure 7-10 Activate Comp

Comp — Select the comp, as defined in Maintenance > Payments > Comps.

Button Pos — Enter the button position for the comp.

Activate — Activates the comp when selected, or disables the comp when cleared.

(16) Set Guest Check Message

The Set Guest Check Message event activates a guest check message. The dialog box shown in Figure 7-11 displays:

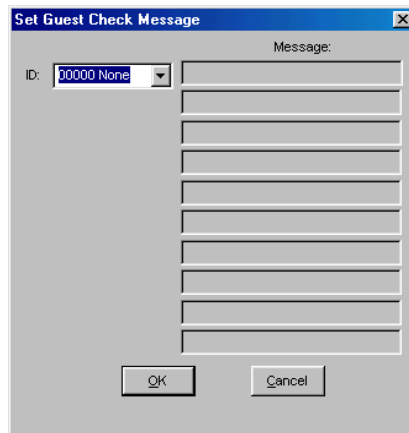


Figure 7-11 Set Guest Check Message

ID — Specifies the message, as defined in Maintenance > Messages > Main Screen.

Message — Displays the message selected from the 'ID' drop-down list. This message cannot be edited in Events.

(17) Set Modifier Item

The Set Modifier Item event adds an item to a modifier group only when the system modifier method is in use. Use this event for such things as displaying a modifier that is not available at certain times. The dialog box shown in Figure 7-12 displays:

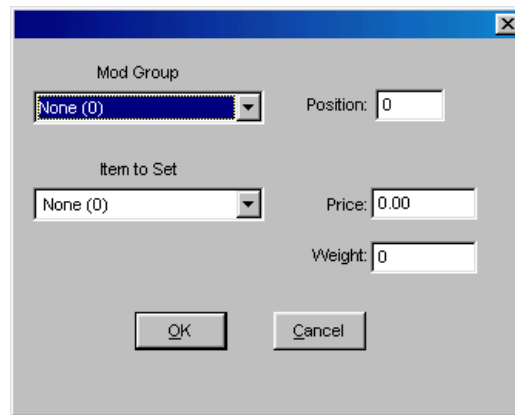
A screenshot of a Windows-style dialog box titled "Set Modifier Item". The dialog has a blue title bar with a close button (X) in the top right corner. The main area is light gray and contains several controls. On the left, there are two drop-down menus. The top one is labeled "Mod Group" and has "None (0)" selected. The bottom one is labeled "Item to Set" and also has "None (0)" selected. To the right of these are three text input fields. The top one is labeled "Position:" and contains the number "0". The middle one is labeled "Price:" and contains "0.00". The bottom one is labeled "Weight:" and contains "0". At the bottom center of the dialog are two buttons: "OK" and "Cancel".

Figure 7-12 Set Modifier Item

Mod Group — Select the modifier group containing the item, as defined in Maintenance > Menu > Modifiers

Item to Set — Select the item to activate, as defined in Maintenance > Menu > Items.

Position — Enter the button position for the modifier on the modifier group.

Price — Enter the price of the modifier item.

Weight — Enter the selection weight of the modifier item.

(19) Reroute Video

The Reroute Video event activates rerouting for a remote display system. The dialog box shown in Figure 7-13 displays:

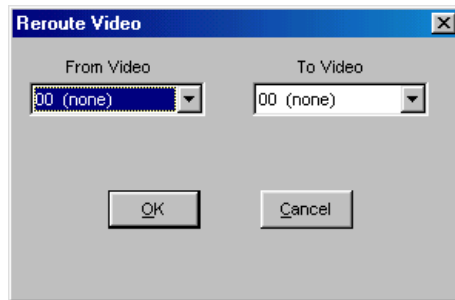


Figure 7-13 Reroute Video

From and To Video — Select the video routing from and the target video, as defined in Maintenance > Hardware > Video Monitors.

(20) Reroute Video Group

The Reroute Video Group event activates rerouting for a video group. The dialog box shown in Figure 7-14 displays:

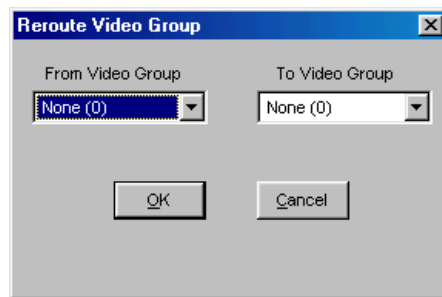


Figure 7-14 Reroute Video Group

From and To Video Group — Select the video group rerouted from and the target video group, as defined in Maintenance > Hardware > Video Groups.

(22) Reroute Video by Terminal

The Reroute Video by Terminal event activates rerouting videos by terminal. The dialog box shown in Figure 7-15 displays:

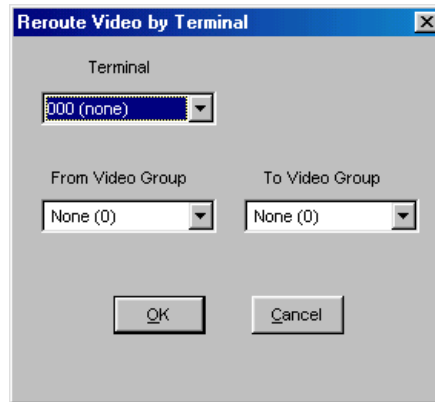


Figure 7-15 Reroute Video by Terminal

Terminal — Specifies the terminal associated with the video group, as defined in Maintenance > Hardware > Terminals.

From and To Video Group — Select the video group rerouting from and the target video group, as defined in Maintenance > Hardware > Video Groups.

(24) Set Job Screen

The Set Job Screen event sets the default screen for employees assigned to a specific job code. If the event is set to occur at a specific time, it will function as a time-related change. If a time is not specified for the event, it becomes effective the next time the data is refreshed. The dialog box shown in Figure 7-16 displays:

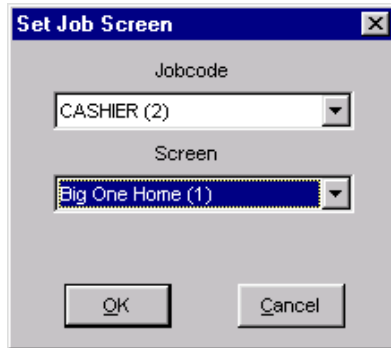


Figure 7-16 Set Job Code

Job Code — Select the job code, as defined in Maintenance > Labor > Job Codes.

Screen — Select the screen, as defined in Maintenance > Menu > Panel Editor.

(25) Set Price Change

The Set Price Change event schedules temporary price changes. The dialog box shown in Figure 7-17 displays:



Figure 7-17 Set Price Change

Price Change — Select the price change, as defined in Maintenance/Menu/Price Changes.

(26) Activate Tender

The Activate Tender event activates and disables a specific tender type. Use this event for times such as when gift certificates are only accepted during the evening hours, the tender can be activated at 5:00 p.m. each day. Add another event to disable the tender. To disable a tender type, add the event and DO NOT select the 'Active' check box. The dialog box shown in Figure 7-18 displays:



Refer to Chapter 5, Menu Maintenance Functions, for more information about button placement.

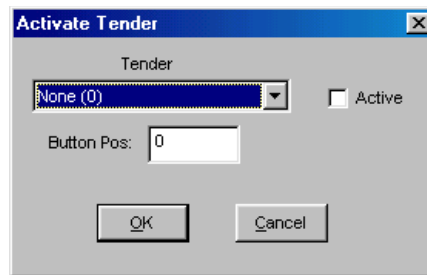


Figure 7-18 Activate Tender

Tender — Select the tender, as defined in Maintenance > Payments > Tenders.

Button Pos — Enter the button position for the tender.

Active — Activates the tender when selected, or disables when cleared.

(27) Set Pole Message

The Set Pole Message event activates messages which the ‘Display on Pole’ check box is not selected. It is possible to have an active message display at the same time as a message that is activated using this event type. The messages alternate on the pole display. The dialog box shown in Figure 7-19 displays:

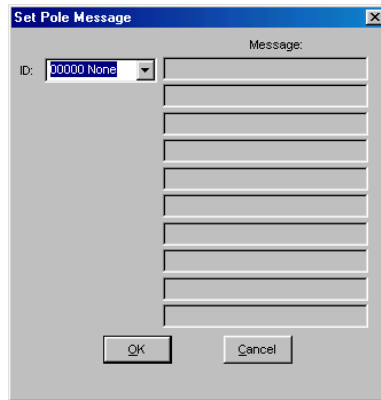


Figure 7-19 Set Pole Message

ID — Select the message set up for pole display, as defined in Maintenance > Messages > Main Screen.

Message — Displays the message selected from the ‘ID’ drop-down list. This message cannot be edited in Events.

(28) Disable Void Reason

The Disable Void Reason event disables a void reason. The dialog box shown in Figure 7-20 displays:

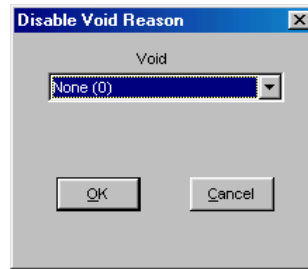


Figure 7-20 Disable Void Reason

Void — Select the void reason, as defined in Maintenance > System > Void Reasons.

(30) Disable Price Change

The Disable Price Change event schedules a temporary suspension of a price change. Use this event for times such as when a happy hour price that begins at 6 p.m. and that would otherwise end at EOD can be set to end at 8 p.m. The dialog box shown as Figure 7-21 displays:



Figure 7-21 Disable Price Change

Price Change — Select the price change, as defined in Maintenance > Menu > Price Changes.

(31) Set Gst Check Footer Msg by Term

The Set Guest Check Footer Message by Terminal event sends a guest check message on a per-terminal basis. When set, this event prints any messages defined in Maintenance > Messages > Main Screen along with messages already defined in Maintenance > Messages > Guest Check. The dialog box shown in Figure 7-22 displays:

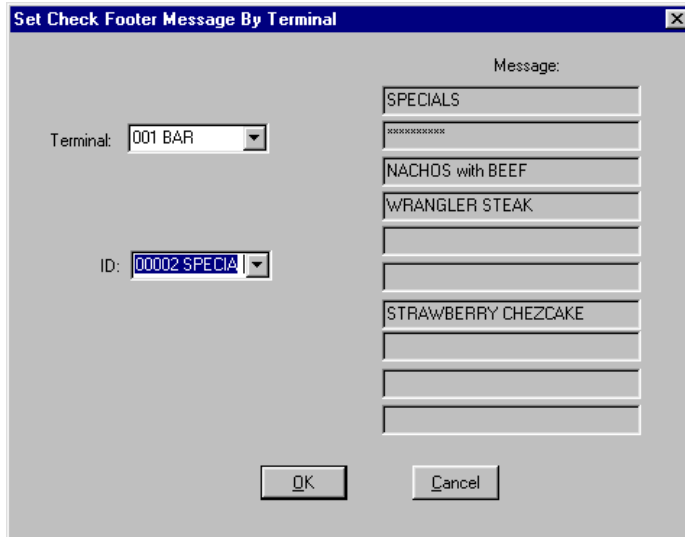


Figure 7-22 Set Check Footer Message by Terminal

Terminal — Specifies the terminal associated with the message, as defined in Maintenance > Hardware > Terminals.

ID — Select the message, as defined in Maintenance > Messages > Main Screen.

Message — Displays the message selected from the 'ID' drop-down list. This message cannot be edited in Events.

(33) Reroute Tax

The Reroute Tax event reroutes one tax to another. The dialog box shown in Figure 7-23 displays:

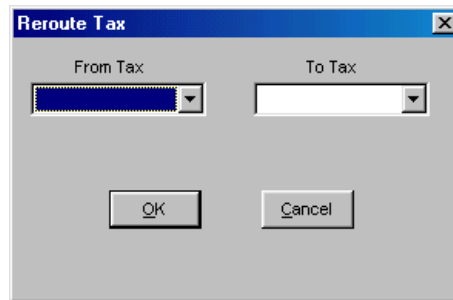


Figure 7-23 Reroute Tax

From and To Tax — Specifies the tax rerouted from and the target tax, as defined in Maintenance > Menu > Taxes.

This event supports the Centralized Database Management (CDM) feature in that it enables the corporate data manager to assign a generic tax id to items, no matter which tax record the specific store uses. When CDM is being used, the corporate data manager is able to set up events which are specific to a store. Since taxes vary by area, a Reroute Tax event can then be set to reroute the generic tax id to the correct tax for the area. 'From Tax' is used to specify the generic tax id and 'To Tax' specifies the correct tax id for the area.

To use this feature, the corporate data manager creates the following standard tax records:

- 1) Default Food
- 2) Default Liquor
- 3) Default Beer
- 4) Default Wine
- 5) Default Retail
- 6) Default Inclusive Food
- 7) Default Inclusive Liquor

- 8) Default Inclusive Beer
- 9) Default Inclusive Wine
- 10) Default Inclusive Retail
- 11) Default Secondary Food
- 12) Default Secondary Liquor
- 13) Default Secondary Beer
- 14) Default Secondary Wine
- 15) Default Secondary Retail

These are suggested names. The corporate data manager can use any name desired to represent the standard tax records. It is suggested, however, that each tax record have a self-documenting name, so that selection from a list that contains only the Tax Name and Number is not an issue. Tax records 16 - 20 should be reserved for special taxes, such as the tax on the To Go order modes, etc. These special taxes may not be used now, but it is nice to set aside the first tax Ids as the 'default' taxes so you can easily differentiate between default taxes and the actual tax records used in the store.

The default tax records are not actually used in the store, so their corresponding rate can be set to a default rate, such as the rate most commonly used (10% or 11%).

Along with the default tax records, all tax records needed to support the organization must be created in the corporate tax file.

When creating items, the corporate data manager assigns the appropriate default tax, therefore, enabling items to be distributed to all stores, regardless of their tax specification.

The corporate data manager then creates tax-rate specific event for each tax record. The event specifies the default tax record, such as Defaulted (1) in 'From Tax'. 'To Tax' is used to specify the correct tax record, such as 8% Food, which might be tax ID 25 in the Tax file. For ease of use, it is strongly suggested that the corporate data manager adopt the naming convention above for the default tax records, and “#% Tax Type” as the actual store tax records (i.e., use 8.25%Retail for an 8.25% retail tax).

(35) Activate Store Specific Item

The Activate Store Specific Item event activates a store specific item configured with a preceding tilde (~) symbol in the short name of the item. This event is commonly used in a Centralized Data Management (CDM) environment where the central site sends items to select stores to be activated at certain times. The dialog box shown in Figure 7-24 displays:



Figure 7-24 Activate Store Specific Item

Item to Activate — Select the inactive item configured with the tilde (~) symbol in the short name, as defined in Maintenance > Menu > Items.

Item Name — Select the new name of the item to be implemented at the store.

(36) **Activate Panel Button**

The Activate Panel Button event activates a button on a panel at a specific time. This event is commonly used in a Centralized Data Management (CDM) environment where the central site sends items on a button to select stores to be activated at certain times. The dialog box shown in Figure 7-25 displays:

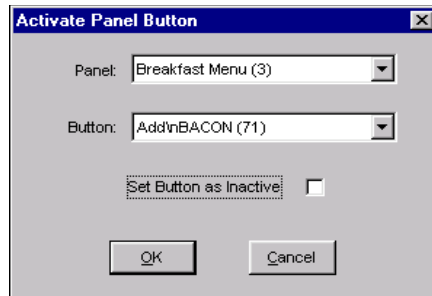


Figure 7-25 Activate Panel Button

Panel — Select the panel, as defined in Maintenance > Menu > Panel Editor.

Button — Select the button located on the panel, as defined in Maintenance > Menu > Panel Editor.

Set Button as Inactive — Disables the button when selected, or activates when selected.

(37) Reroute Secondary Taxes by Revenue Center

The Reroute Secondary Taxes by Revenue Center event reroutes taxes controlled by revenue centers. The dialog box shown in Figure 7-26 displays:

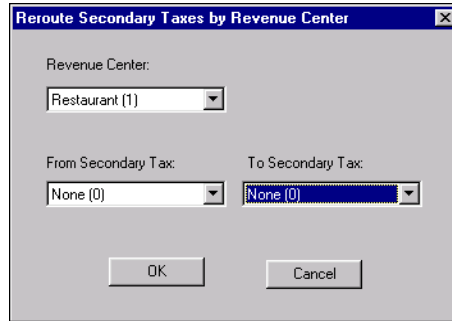
A screenshot of a Windows-style dialog box titled "Reroute Secondary Taxes by Revenue Center". It contains three dropdown menus: "Revenue Center:" with "Restaurant (1)" selected, "From Secondary Tax:" with "None (0)" selected, and "To Secondary Tax:" with "None (0)" selected. At the bottom are "OK" and "Cancel" buttons.

Figure 7-26 Reroute Secondary Taxes by Revenue Center

Revenue Center — Select the revenue center associated with the tax, as defined in Maintenance > System > Revenue Centers.

From and To Secondary Tax — Select the tax reroute from and the target tax, as defined in Maintenance > Menu > Taxes.

(38) Reroute Display Board

The Reroute Display Board event reroutes item information from one display board to appear on another display board. The dialog box shown in Figure 7-27 displays:

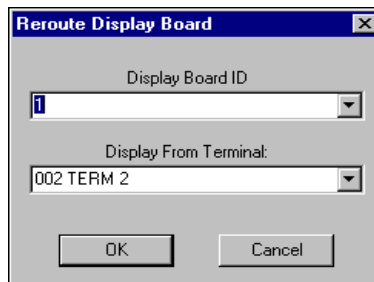
A screenshot of a Windows-style dialog box titled "Reroute Display Board". It contains two dropdown menus: "Display Board ID" with "1" selected and "Display From Terminal:" with "002 TERM 2" selected. At the bottom are "OK" and "Cancel" buttons.

Figure 7-27 Reroute Display Boards

Display Board — Indicates the display board to reroute, as defined in Maintenance > Hardware > Display Boards.

Display from Terminal — Indicates the new terminal from which the order will display.

Required Fields

Use the Required Fields function to require the BOH user to enter certain information into the system. You define the information you want to require. For example, if you want all BOH users to remember to enter telephone number information for all employees, include 'Telephone' as a required field. The available list of fields display in tab order of the function.

Select Maintenance > System > Required Fields to display the Required Fields function tab, as shown in Figure 7-28:

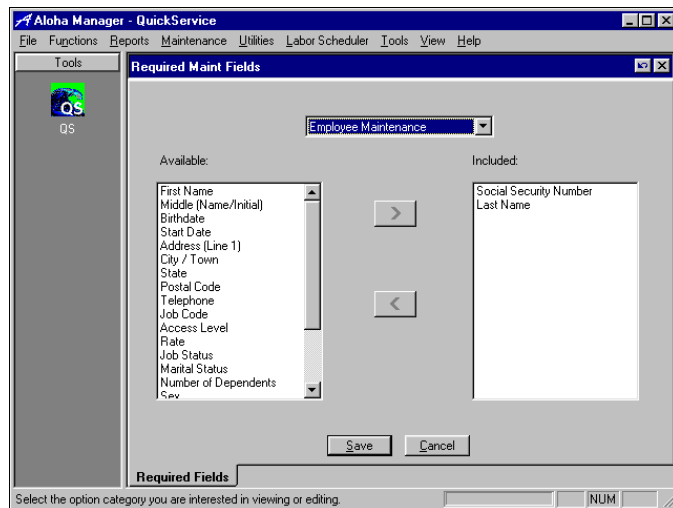


Figure 7-28 Required Fields Function Tab

Currently, you can only require fields from the subtabs in Maintenance > Labor > Employees. 'Social Security' and 'Last Name' display in the 'Included' list box, as they are always required. You can not make them optional. When a field becomes required the text box highlights in yellow.

Select the fields to be required entries in the 'Available' list box and click > to move them to the 'Included' list box. Select the fields in the 'Included' list box and click < to move it back to the 'Available' list box, therefore, they are not required entries.

Order Modes

Order modes govern the behavior of menu items when they are ordered on order entry terminals. The Order Modes function tab is used to define the different ways customer orders are received within the restaurant. The buttons themselves are created, and their primary actions are defined in Maintenance > Menu > Panel Editor. In the Order Modes function tab, the actions of the order mode buttons are refined and specified beyond the basic functions available in the Panel Editor.

Select Maintenance > System > Order Modes to display the Order Modes function tab, as shown in Figure 7-29:

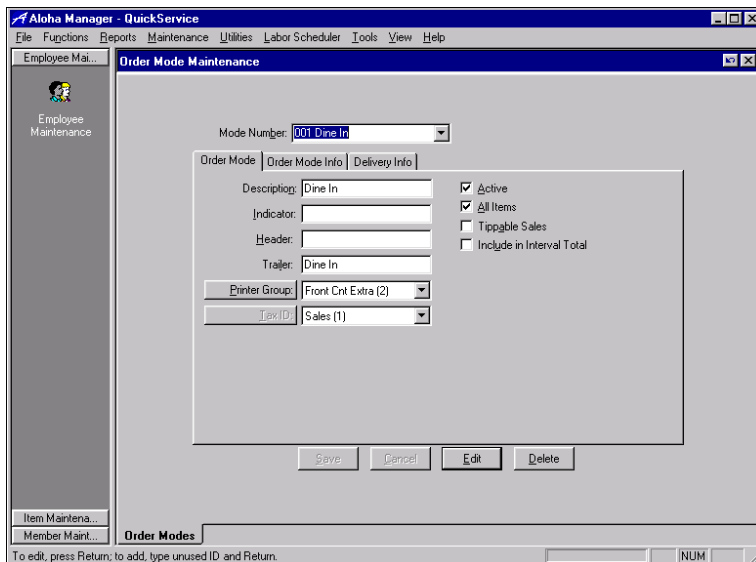


Figure 7-29 Order Modes Function Tab

Mode Number — Holds a three-digit ID number that together with 'Description' uniquely identifies each Order Mode record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Mode Number drop-down list, select the record to edit and press Enter.

The Order Modes function tab provides the following subtabs which are used to maintain Order Mode records: Order Mode, Order Mode Info, and Delivery Info.

Order Mode Subtab

The Order Mode subtab enables you to establish and define the order modes as they appear on the order entry terminal screen. Typical order modes include Dine In, To Go, Appetizers, and Express. Activate order modes by using one of the programmed events in Maintenance > System > Events, or by selecting the 'Active' check box on the Order Mode subtab.

Description — Enter a descriptive name for the order mode. Enter a new description or edit an existing description as needed.

Indicator — Specifies special characters that are used to mark items when ordered at order entry terminals. These special characters, such as '->', help make it clear to the server that an item has been ordered in a given mode.

Header — Specifies a character string to print on the chit at the beginning of the items sent in that order mode. This string can be simple, such as 'To Go', or descriptive, such as 'The Following Items To Go' for a to go order mode.

Trailer — Specifies a character string to print on the chit at the end of the items sent in that order mode. This string can be simple, such as 'To Go', or descriptive, such as 'The Above Items To Go' for a 'to go' order mode.

Printer Group — Sets the routing for items ordered in the defined order mode. The selection in the Order Mode function tab overrides all other printer routing in the Aloha menu system. This selection must be active only in those cases where specific routing is needed for the defined order mode, such as a special printer for To Go orders. If no special routing requirements exist for the defined order mode, this selection should be set to None.

Printer Group Button

Click Printer Group to access the Printer Groups function tab and create new printer groups, if necessary. Changing printer group records affects all printers assigned to that printer group and all records that make reference to that group.

Tax ID — Overrides all other tax methods in the Aloha menu system and is used if there are specific requirements for the defined order mode. If there are no special tax requirements for the defined order mode, this selection should be set to None.

Tax ID Button

Click Tax ID to access the Taxes function tab and create new tax records, if necessary. Changing a tax record affects all items assigned to that tax and all records that make reference to it.

Active — Sets the defined order mode to active, and activates the corresponding order mode buttons on the order entry terminals. The order mode can also be activated in Maintenance > System > Events.

Tippable Sales — Used to include items sold in the defined mode as tippable sales. This check box should not be selected for order modes not subject to tipping.

Round to Nickel — Rounds the order mode charges, if any, to the nearest nickel. For example, if a To Go charge is \$1.98, it is rounded to \$2.

Include in Interval Total — This feature is not available in the QuickService product.

Order Mode Info Subtab

The Order Mode Info subtab provides you with more features to refine the configuration of the defined order mode. Define category inclusion, fixed charges and non-taxable situations on this subtab. The voucher and expeditor

printers are also definable on this subtab. Select the Order Mode Info subtab from the Order Modes function tab, as shown in Figure 7-30:

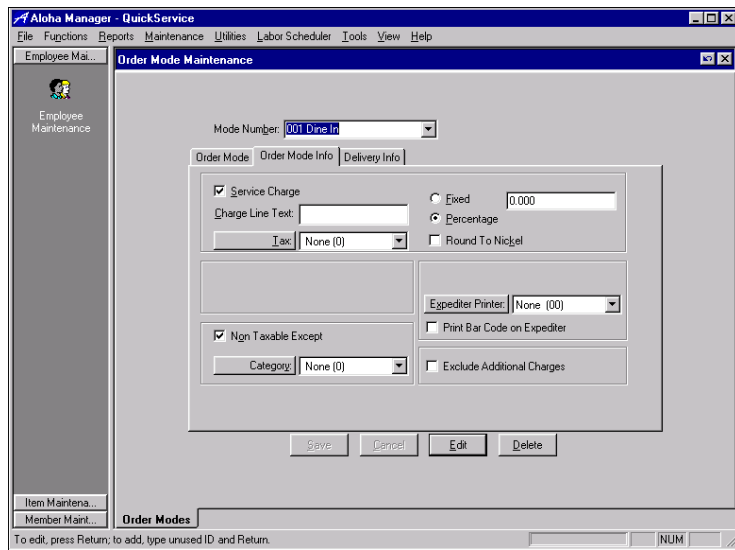


Figure 7-30 Order Mode Info Subtab

Service Charge Inset

Service Charge — Enables the use of a surcharge applied to the order mode and activates the options available in the Service Charge inset.

Charge Line Text — Specifies the text for an additional line to print on the guest check.

Fixed — Designates the service charge is a fixed monetary value. If selected, the amount entered in the adjacent text box is added to the guest check when this order mode is applied. For example, if there is a \$2.00 charge for 'To Go' items, select 'Fixed', then enter 2.00 in the adjacent text box.

Percentage — Designated the service charge is treated as a percentage rate. If selected, the percentage rate entered in the text box to the right is used to calculate a percentage of the guest check total. The amount is added to the guest check when this order mode is applied. For example, if there is a 10 percent up-charge for 'To Go' items, select 'Percentage', then enter 0.10 in the adjacent text box.

Round to Nickel — Rounds the order mode charges, if any, to the nearest nickel. For example, if a 'To Go' charge is \$1.98, it is rounded to \$2.00.

Tax Button

Click Tax to access the Taxes function tab and create new taxes, if necessary. Changing a tax changes all order modes assigned to that tax.

Tax — Select the tax method, if any, to apply to the service charge.

Expediter Printer Button

Click Expediter Printer to access the Printers function tab and create a new printer, if necessary. A printer must physically exist and be connected to an order entry terminal before you can create it.

Expediter Printer — Reroutes the global expediter printer to another printer. The global expediter printer must be set up before using the order mode expediter printer. Set up the global expediter printer in Maintenance > Hardware > Printers. Select an expediter printer from the drop-down list.

Expediter printers can print bar codes on guest checks if the printer is a thermal printer. Select Maintenance > Store Settings to activate the bar code print feature. Select Printing from the Group drop-down list, then select the Chit Style subtab to activate the bar code feature.

Print Bar Code on Expediter — Prints the bar code number on the expediter's chit.



Refer to Chapter 3, Store Settings, in the Financial section on the Add Charges subtab, for more information about additional charges.

Non Taxable Except Inset

Non Taxable Except — Used to treat the selected order mode as nontaxable, with the exception of the category selected in the ‘Category’ drop-down list associated with this check box. When selected, the ‘Category’ drop-down list is activated.

Category Button

Click Category to access the Categories function tab and create a new category, if necessary.

Category — Select the exception category that is to be taxed for the defined order mode from the drop-down list.

Additional Charges Inset

Exclude Additional Charges — Indicates additional charges are not included when items are ordered in this order mode. The following scenarios illustrate this functionality:

- If *all* items on the guest check are rung up under an order mode that excludes the additional charge, it is not applied to the guest check.
- If the guest check includes items rung up under two or more order modes and one allows an additional charge that is set up as a percentage, the percentage applies only to the order mode set with the additional charge.
- If the guest check includes items rung up under two or more order modes and one order mode is set with a flat fee additional charge, the entire amount of the flat fee is applied to the guest check.

Delivery Info Subtab

The Delivery Info subtab enables you to establish the way a delivery ticket prints. This subtab will only be present if Delivery/Frequent Buyer is installed. Delivery/Frequent Buyer is part of the Customer Management Solutions package. Delivery/Frequent Buyer is a program used to track customer sales history. It also provides the ability to set up different programs to reward and encourage guests to buy more frequently with the use of coupons and bonus plans. Please refer to the Delivery/Frequent Buyer manual for details on how to configure the delivery program.

Order Entry Queues

Order Entry Queues organize and route incoming orders and the information generated by the item order process. This feature provides the ability to establish the default order mode for the queue, assign a bitmap to the button that is used to select the queue, sets the number of orders that can remain open, and assigns numbers to the orders. Automatic processes such as credit card order closure, printing, and new order opening are also controlled here.

Select Maintenance > System > Order Entry Queues to display the Order Entry Queues function tab, as shown in Figure 7-31:

The screenshot shows a software window titled "Aloha Manager - QuickService" with a menu bar (File, Functions, Reports, Maintenance, Utilities, Labor Scheduler, Tools, View, Help). The "Order Entry Queue Maintenance" dialog box is open, displaying the following fields and controls:

- Queue ID:** A dropdown menu showing "01 Terminal-1".
- Name:** A text field containing "Terminal-1".
- Default Order Mode:** A dropdown menu showing "00001 Order".
- Bitmap:** A dropdown menu showing "None".
- Max Open Orders:** A text field containing "25".
- Minimum Order #:** A text field containing "100".
- Maximum Order #:** A text field containing "199".
- Order # Prefix:** A text field containing "Terminal-".
- Auto Close?** A checked checkbox.
- Auto Print?** An unchecked checkbox.
- Auto Open New Order?** A checked checkbox.

At the bottom of the dialog are four buttons: "Save", "Cancel", "Edit", and "Delete". Below the buttons is a tab labeled "Order Entry Queues". At the very bottom of the window, a status bar reads: "To edit, press Return; to add, type unused ID and Return." followed by a "NUM" button.

Figure 7-31 Order Entry Queues Function Tab

Queue ID — Holds a two-digit number that together with 'Name' uniquely identifies each order entry queue.

Name — Enter a descriptive name for the queue.

Default Order Mode — Establishes the order mode that is automatically selected for the queue.

Bitmap — Assigns an image to display on the header of each order that visually identifies the queue from which the order originated.

Max Open Orders — Defines the maximum number of orders that can remain open simultaneously in the order queue.

Minimum Order # — Sets the minimum number that the system will assign to the order.

Maximum Order # — Sets the maximum number that the system will assign to the order.

Order # Prefix — Sets a prefix that appears in front of the order number.

Auto Close Credit Cards? — Closes credit card orders automatically when approval is received.

Auto Print? — Prints guest check when the order closes.

Auto Open New Order? — Opens a new order when the previous order closes.

Revenue Centers

Revenue Centers summarize income from different sections in the restaurant, such as the drive-thru window, a patio dining area, a main dining area, or a take-out service. These income sources are reported as revenue centers on the various financial reports available through the Aloha system.

Select Maintenance > System > Revenue Centers to display the Revenue Centers function tab, as shown in Figure 7-32:

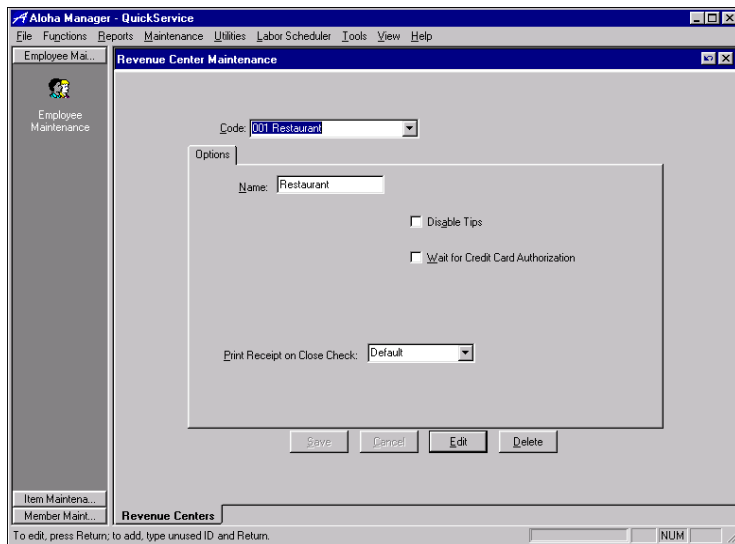


Figure 7-32 Revenue Centers Function Tab

Code — Holds a three-digit number that together with 'Name' uniquely identifies each revenue center. To create a new record, enter an unused number and press Enter. To edit an existing record, select it from the 'Code' drop-down list, and press Enter.

Name — Enter a descriptive name for the revenue center. Naming conventions are entirely up to the user. However, it is suggested that the name be descriptive or reflect revenue center functions.

Print Receipt on Close Check — Used to determine how often to print a receipt when a check is tendered on a terminal linked to the specific revenue center. Three selections are available:

- **Never** — Prevents receipts from printing when a check is closed on a terminal linked to the specific revenue center.
- **Always** — Forces a receipt to always print when closing a check on a terminal linked to the specific revenue center.
- **Default** — Disables the Print Receipt option and reverts to the default settings in the Tender functions to dictate whether or not a receipt prints.

Disable Tips — Disables tip tracking for the selected revenue center only. This selection overrides the ‘Tips’ selection found under Maintenance > Payments > Tenders.

Wait for Credit Card Authorization — Pauses the terminal while a credit card transaction is taking place. The Authorization in Progress screen displays during credit card authorizations and the terminal is not available for input until the authorization is complete.

Day Parts

The Day Parts function tab defines specific blocks of time used to divide the parts of the day. These time blocks organize business data for reporting purposes and enable other Aloha features that rely on defined day parts, such as event scheduling, surveys and tip sharing.

Select Maintenance > System > Day Parts to display the Day Parts function tab, as shown in Figure 7-33:

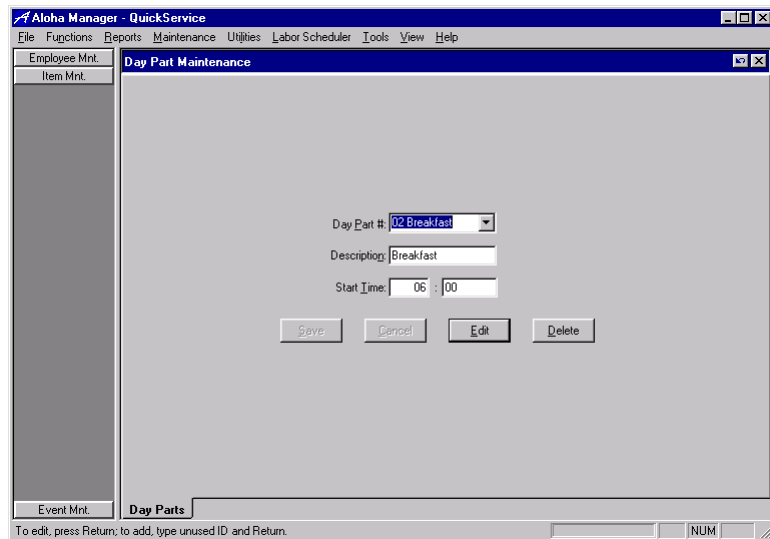


Figure 7-33 Day Parts Function Tab

Day Part # — Holds a two-digit number that together with 'Description' uniquely identifies each day part. Up to 99 day parts can be defined. To create a new record, enter an unused number and press Enter. To edit an existing record, select it from the 'Day Part #' drop-down list, and press Enter.

Description — Determines the name of the day part. The name should be descriptive of the day part for ease of reference.

Start Time — Determines the start time for the day part. Enter the time using a 24-hour clock format. Hours are entered on the left, minutes on the right. A time after midnight (00:00) is specified by adding 24 to the hour. For example, 28:00 is 4:00 a.m. the next day.

Concepts

Concepts are an increasingly common convention in the corporate-to-store hierarchy where a master database is used to conform to multi-branding operations. For example, a master database which corporate maintains may include menus and items for all supporting operations, such as an ice cream parlor, donut shop, and more, but are only used in their respective store. This provides top-level reporting capabilities per store in the Sales report and PMix report. The PMix report displays two columns for quantity count and percentage sold for each concept.

When concepts are defined, they are assigned to individual items in Maintenance > Menu > Items for proper distribution. For example, an item pepperoni, is sold only at one concept, therefore, that concept is attached to the item, pepperoni. 100% of sales for that item is reported to the concept.

If items are configured to be shared throughout stores, such as beverages, a common distribution must be determined to distribute sales to the proper concept. The concept, 'None' should be attached to all common items in the master database. Common items, however, is not a recommended technique and should only be administered on an existing master database. For new databases, it is recommended to assign individual items per concept.

Select Maintenance > System > Concepts to display the Concepts function tab, as shown in Figure 7-34:

Aloha Manager - QuickService

File Functions Reports Maintenance Utilities Labor Scheduler Tools View Help

Employee Maintenance

Item Maintenance

Member Maintenance

Concepts Maintenance

Number: 01 Sandwich Shop

Description: Sandwich Shop

Common Distribution %: 33.00

Save Cancel Edit Delete

Concepts

To edit, press Return; to add, type unused ID and Return.

NUM

Figure 7-34 Concepts Function Tab

Number — Holds the ID number for the concept.

Description — Determines the name of the concept. The name should describe the concept for ease of reference.

Common Distribution% — Determines the percentage of transaction data for common items. The total of all defined concepts must equal 100%. If the total distribution of all concepts does not equal 100%, the system recalculates the percentages, as necessary. The sales for common items are distributed between the concepts for reporting purposes.

Void Reasons

The Void Reasons function tab enables you to maintain a database file that is useful for auditing and reporting purposes in tracking the types and characteristics of voids recorded by the system. Voids can be marked as affecting or not affecting inventory.



If an employee is assigned to a job code with 'Allow to void own items' selected, Void Reasons do not display on the screen and no password is requested. The Void Report will show 'Void Reason UNKNOWN'.

When an employee attempts to delete an item that has been sent to the kitchen from a guest check, a reason for the void must be selected. If the employee is assigned to an access level with 'Void Items' selected, they can enter their password at the 'Enter manager password' prompt, select a reason for the void, and complete the transaction. If they are not, a manager is required to complete the transaction. If the employee is assigned to a job code with 'Allow to void own items' selected, no password message or void reasons will display.

Select Maintenance > System > Void Reasons to display the Void Reasons function tab, as shown in Figure 7-35:



Refer to Chapter 4, Labor Maintenance Functions, for more information about Access Levels.

Figure 7-35 Void Reasons Function Tab

ID — Holds an unused two-digit number that together with 'Description' uniquely identifies each void reason. To create a new record, enter an unused ID and press Enter. To edit an existing record, select it from the 'ID' drop-down list, and press Enter.

Description — Designates the name of the void reason. The name should be descriptive of the reason for the void, for ease of reference.

Affects Inventory — Used to characterize each void reason type according to its affect on inventory. Void reasons that affect inventory add the item back into inventory and allow the item to be sold again. Void reasons that do not affect inventory do not change the inventory count or item availability.

The system also provides the ability to set a time limit on voids. After the specified time interval expires, the system no longer accepts a void for a given order. Select Maintenance > Store Settings to display the Store Settings function tab. Select Security from the 'Group' drop-down list. Select the Restrictions subtab for access to the setting, as shown in Figure 7-36:

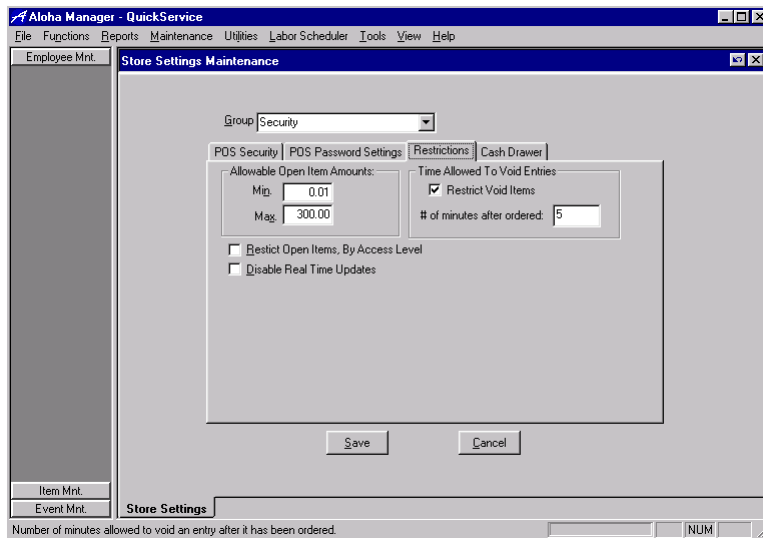


Figure 7-36 Restrictions Subtab

In the Time Allowed to Void Entries inset, select 'Restrict Void Items' and specify a time interval in minutes.

No Sale Reasons

The No Sale Reasons function tab provides the ability to define or change No Sale Reasons. When a cash drawer is opened or other actions take place that can potentially impact the interpretation of the daily sales and business reports, it is often useful to have that action accompanied by a No Sale Reason message in the daily reports.

If an employee is assigned to an access level with 'No Sale' selected, the Open Drawer button is available, otherwise it does not display on the FOH terminal. When this button is selected without first entering a sale, a reason for the no sale must be selected.

Select Maintenance > System > No Sale Reasons to display the No Sale Reasons function tab, as shown in Figure 7-37:

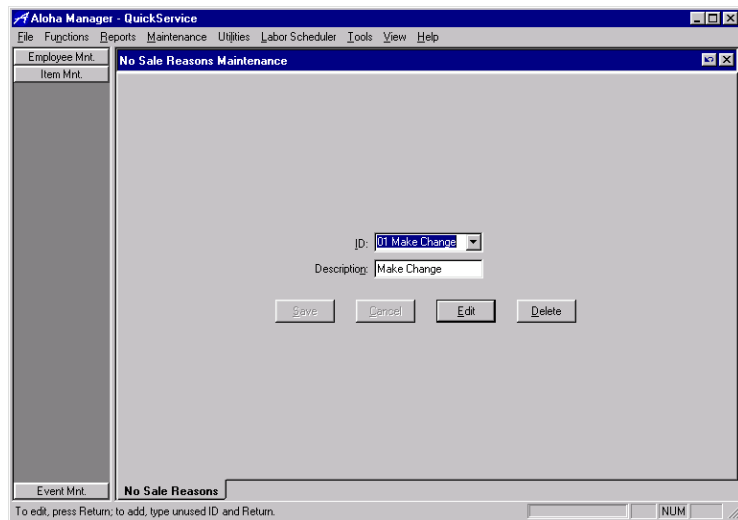


Figure 7-37 No Sale Reasons Function Tab

ID — Holds a two-digit number that together with 'Description' uniquely identifies the record. Up to 10 no sale reasons may be entered. To create a new record, enter an unused number and press Enter. To edit an existing record, select it from the 'ID' drop-down list, and press Enter.

Description — Designates the name of the no sale reason. The name should be descriptive of the reason, for ease of reference.

Petty Accounts

The Petty Accounts function tab provides the ability to define a tracking system for petty cash transactions. There are two types of accounts, Cash In accounts for petty cash 'Paid Ins,' and Cash Out accounts for petty cash 'Paid Outs.' The system permits up to 20 petty cash accounts.

Select Maintenance > System > Petty Accounts to display the Petty Accounts function tab, as shown in Figure 7-38:

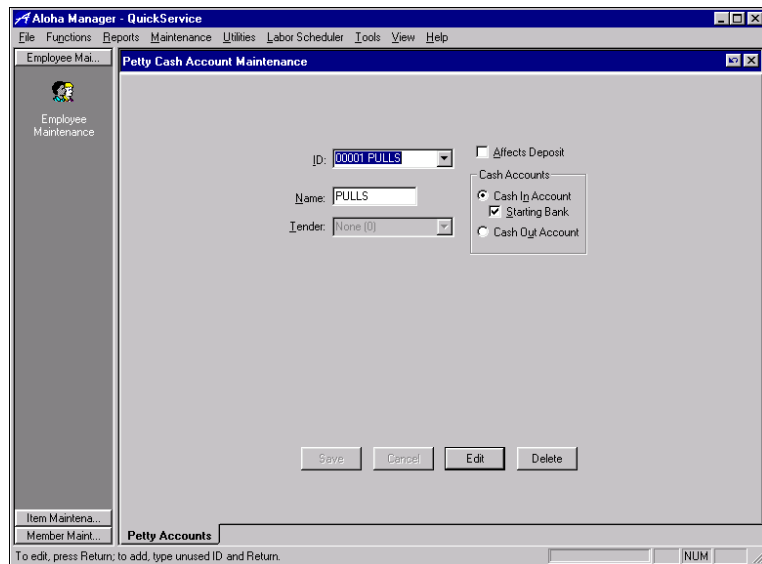


Figure 7-38 Petty Accounts Function Tab

ID — Holds a five-digit ID number that together with 'Name' uniquely identifies each petty cash account record. To create a new record, enter an unused number and press Enter. To edit an existing record, select it from the 'ID' drop-down list, and press Enter.

Name — Designates the name of the petty cash account.

Tender — Applies to cash out accounts only. Only non-cash tenders are displayed for selection. If a cash out account has a non-cash tender attached, the cash out does not show on the regular Paid Out section on the Server Checkout. This amount displays in the non-cash transactions section in the audit section of the checkout report.

Affects Deposit — Used to note whether activity in the defined account affects bank deposits. If money is simply being moved to or from the safe, the deposit is not affected. If the money is paid to a vendor, the deposit is affected. When using the Tip Out functionality and creating a petty cash account, make sure 'Affects Deposit' is not selected.

Cash Accounts Inset

Cash In Account — Used to mark the account as an account that receives cash payments. The Tenders drop-down list becomes unavailable when Cash In Account is selected.

Cash Out Account — Used to mark the account as an account that disburses cash payments.

Routing Levels

The Routing Levels feature provides overall control of routing from one place to another for items waiting in a queue. You can specify item routing within your restaurant that takes maximum advantage of the strengths of your restaurant staff and facilities. Change video group assignments to reroute the display of pending orders from one area of the restaurant to another. Routings specified in Routing Levels override any other routing specifications.

To open the Routing Levels function tab, select Maintenance > System > Routing Levels, as shown in Figure 7-39:

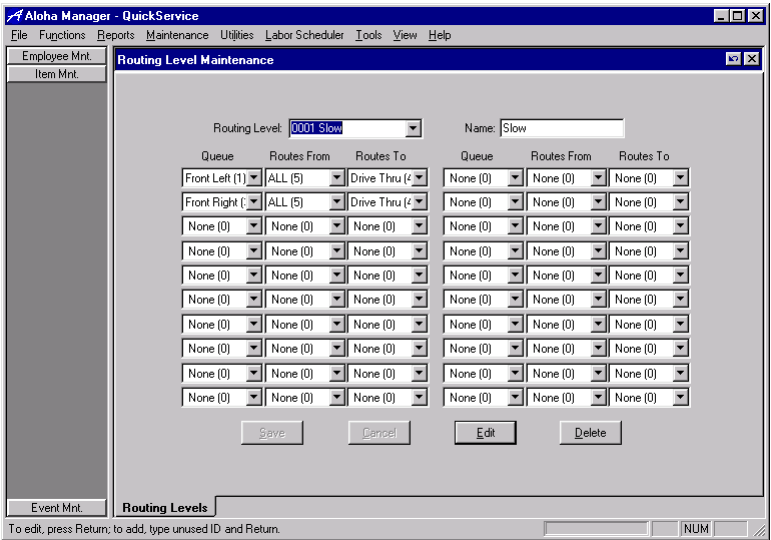


Figure 7-39 Routing Levels Function Tab

Routing Level — Holds a number that together with 'Name' uniquely identifies each Routing Level record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Routing Level drop-down list, select the record to edit, and press Enter.

Name — Specifies a descriptive name for the Routing Level.

Queue — Scroll through the drop-down list, select a queue record and press Enter. This selection identifies the order queue source that must be rerouted.

Routes from — Scroll through the drop-down list, select a source record and press Enter. This selection identifies the video group to which the queue being rerouted belongs.

Routes to — Scroll through the drop-down list, select a destination record and press Enter. This selection identifies the video group to which the queue being rerouted is to be reassigned.

Remember to specify queue, source video group, and destination video group on the same line for each routing. If one of these three elements is missing for a given routing, the desired action will not take place.

Volume Levels

The Volume Levels feature is available when you are using remote display systems. This feature displays a suitable descriptive name on the order entry terminals that relates to the level of business that is taking place in the restaurant in a specified time interval. The names are defined by specific gross sales levels. For example, if a 'Slow' level is defined as \$0.01 to \$199.00, and if this is the level of sales on record, the order entry terminal will display 'Slow'.

Defined time intervals are cumulative and relate to the present moment. For example, if the time interval is defined as 30 minutes, the volume level reported on the order entry terminal will reflect the amount of business on record in the 30 minutes immediately prior to that moment.

This feature also provides the ability to set promise time for delivery items at specific levels of business. Promise times are set for increasing amounts of time as the level of business increases.

For more information about the features available with remote display systems, please consult the Interfacing RDS with Aloha User's manual.

Hardware Maintenance Functions

This chapter discusses the setup and configuration of hardware that is typically attached to the Aloha system, such as terminals, cash drawers, printers, and remote display system devices.

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Chapter 8

Aloha®

The Hardware configuration features available in the Aloha system provide significant flexibility as well as extensive capabilities.

Select Maintenance > Hardware to display the Hardware menu, shown in Figure 8-1:

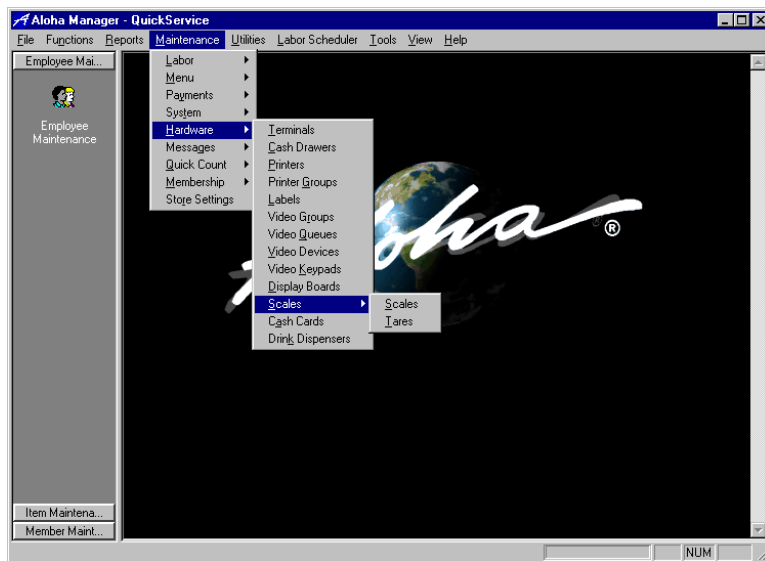


Figure 8-1 Hardware Menu

In the context of an operating restaurant, several types of hardware are typically attached to the system server and the order entry terminals. This hardware provides communication between the manager and the employees, between the restaurant and the customer, and between the restaurant and credit card companies.

Some of the hardware will be output devices, such as remote display systems and printers. Other devices will be bi-directional, such as cash card readers.

In this chapter you learn how to:

- Define and configure terminals and associated reader and display devices.
- Set up and define cash drawers.

- Set up and define printers.
- Define printer groups.
- Define labels.
- Define video groups.
- Set up and define display boards.

Terminals

Each Aloha system installation is licensed for a specific number of order entry terminals, each of which serves as a 'node' or station on the Aloha network. Additional nodes are permitted beyond the licensed number of order entry terminals, but the additional nodes cannot be defined as or used as order entry terminals. For example, a large system licensed for ten order entry terminals might define an additional network node for a file server. The file server would function normally on the network, but could not be used as an order entry terminal, and thus, would not exceed the network license limitations. The typical Aloha POS network consists of one order entry terminal per license and one computer functioning as a file server for the network. The file server is normally located in an area of the restaurant that is only accessible by management personnel.

Peripheral devices, such as printers, pole displays, bar code readers, cash drawers, mag card readers, and monitors are physically attached to the various nodes to become part of the network. Some of these devices, such as printers and monitors (display only), are defined in their own database files and are assigned to a network node while others, such as pole displays, are defined within a terminal record.

Printers and monitors, although attached to a specific network node, are devices shared across the network. Pole displays, also attached to a specific network node, are not shared devices and are available only to the assigned terminal. Thus, an order entry terminal can have access to a printer in the kitchen, but not to a cash drawer at the drive-thru window.

The Terminal function tab allows the user to define and configure each terminal on the Aloha network in terms of its type, its physical characteristics, and the attached peripherals.

Select Maintenance > Hardware > Terminals to display the Terminals function tab, shown in Figure 8-2:

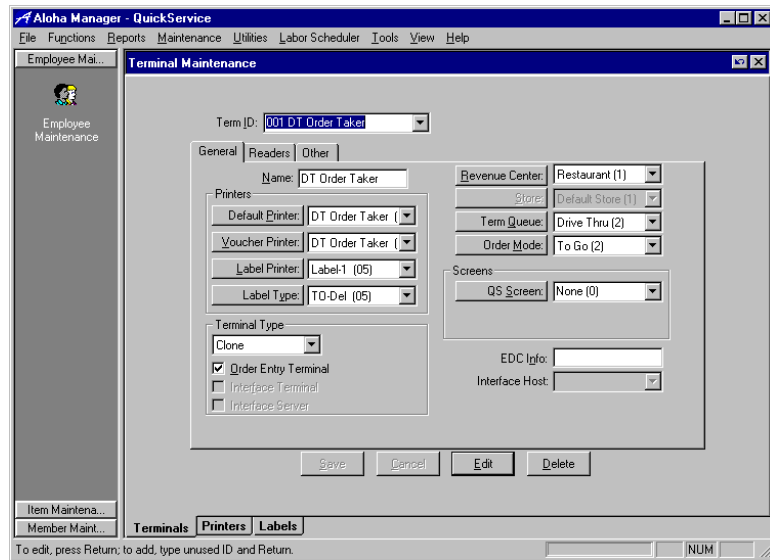


Figure 8-2 Terminals, General Subtab

The Terminals function tab contains three subtabs, General, Readers, and Other. Settings that define the terminal itself and its output are located on the General subtab. Settings that define input equipment attached to the terminal are located on the Readers subtab. Settings that relate to pole display, or other output devices are located on the Other subtab.

Term ID — Holds a three-digit number that together with 'Name' uniquely identifies each terminal record. To create a new record, enter an unused number and press Enter. Select a Default Printer, Voucher Printer, Revenue Center, Terminal Queue, and Terminal Type from the drop-down lists as you define a new terminal. To edit an existing terminal record, scroll through the Term ID drop-down list, select the record to edit and press Enter.

As you create new terminal records, it is important to note that Revenue Center and Term Queue are required settings. If no queue for the terminal is specified, the system will not allow you to save the record. If no revenue center is assigned, the system displays a warning that the reports may not balance, but will allow you to continue. For correct income reporting in the restaurant, it is recommended that a revenue center is selected for the terminal.

As many terminals as there are nodes on the network can be defined as long as the number of terminals defined as order entry terminals does not exceed the number provided under the Aloha license agreement. Terminals are designated as order entry terminals using the Order Entry Terminal check box on the General subtab.

General Subtab

Settings on the General subtab enable you to define the terminal itself, and to define its print output. You can also establish the input screen available to the terminal. The General subtab is shown in Figure 8-2.

Name — Enter a name for the terminal. Terminal naming conventions are entirely up to the user. However, it is suggested that the terminal name be descriptive or reflect the physical location, such as Kitchen, Patio, or Dining 1. This can assist when a terminal fails by reporting a specific location in the error message, and is useful when troubleshooting the network.

Printers Inset

This inset enables you to define and direct the output of the terminal to printers in the restaurant, according to your needs. This capability provides the flexibility to print kitchen orders, labels for take-out orders, credit-card receipts, and guest checks, on different printers in different locations within the restaurant.

Default Printer — Specifies a previously defined printer that may or may not be physically attached to the terminal. This should be the printer that is normally used for local printing by the defined terminal. Local printing includes guest checks, printed reports, and messages. The actual physical connections between a terminal and a printer are set up in Maintenance > Hardware > Printers. To select a printer, scroll through the drop-down list and choose a previously defined printer.

Default Printer Button

Click Default Printer to access the Printers function tab. Here you can perform maintenance in the printers function, including add new records if the printer you need is not there.

Voucher Printer — Designates the printer for EDC vouchers for credit cards. This also requires a previously defined printer that may or may not be physically attached to the terminal defined in the terminal record. To select a voucher printer, scroll through the drop-down list and select a previously defined printer designated for EDC vouchers.

Voucher Printer Button

Click Voucher Printer to access the Printers function tab. Here you can perform maintenance in the printers function, including add new records if the printer you need is not there.

Label Printer — Specifies a previously defined printer that may or may not be attached to the terminal, for the purpose of printing labels that are to accompany take-out orders. To select a printer, scroll through the drop-down list and choose a previously defined printer.

Label Printer Button

Click Label Printer to access the Printers function tab. Here you can perform maintenance in the printers function, including add new records if the printer you need is not there.

Label Type — Specifies a previously defined label type. If a label printer is specified, you must also specify a label type.

Label Type Button

Click Label Type to access the Labels function tab. Here you can define a label for the printer, and the contents of the label.

Revenue Center — Attaches the terminal to a previously defined revenue center.

Revenue Center Button

Click Revenue Center to access the Revenue Centers function tab. Here you can perform maintenance in the Revenue Center function, including add new records if the revenue center you need is not there.

Store — Associates a terminal with a particular store in systems using SuperSite. This function is active only when SuperSite is installed. Refer to the SuperSite User Guide for more information.

Store Button

Click Store to access the Stores function tab. This button is not functional in systems not using SuperSite.

Term Queue — Defines the queue from which the terminal is to receive orders.

Term Queue Button

Click Term Queue to display the Order Entry Queues function tab. Here you can perform maintenance in the Order Entry Queues function, and add new ones as needed.

Order Mode — Defines the type of orders the terminal is to receive.

Order Mode Button

Click Order Mode to display the Order Modes function tab. Here you can perform maintenance in the Order Modes function, and add new ones as needed.

Terminal Type Inset

The settings in this inset define the type of terminal in the terminal record. Select the type of terminal from the drop-down list. If the type of terminal you are using does not display in the drop-down list, contact Technical Support for help with selecting an appropriate terminal type from the list.



Refer to the
SuperSite
User's Guide for more
information.

Order Entry Terminal — Designates the defined terminal as an order entry terminal. The number of *terminals* is not restricted by the Aloha system license. However the number of *order entry terminals* is limited to the number permitted under the license agreement for the restaurant.

Interface Terminal — Designates the selected terminal as an interface terminal. The license agreement for the restaurant must include a specific number of order-entry terminals. When the selected terminal is designated as an interface terminal, an order-entry terminal must be defined as its output terminal.

Interface Server — Defines the file server as an order entry terminal as well, to run the Aloha FOH application without a user interface. The FOH application then functions to receive order information from other order entry devices, such as hand-held input devices, and distributes that information to other devices, such as printers, display screens, and cashier terminals. The file server, when used in this manner, performs FOH functions without the need for an order entry terminal license.

Interface Host — Designates an order-entry terminal to receive the output of an interface terminal.

Screens Inset

This inset enables you to define a specific screen to display on the selected terminal.

QS Screen — Specifies a previously created screen that is to display on the selected terminal. Select the desired screen from the drop-down list.

QS Screen Button

Click QS Screen to display the Screen Editor function tab, as shown in Figure 8-3:

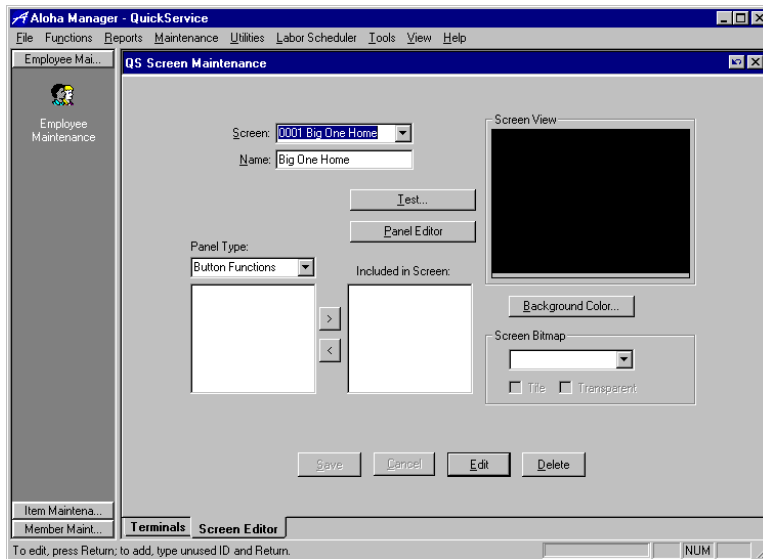


Figure 8-3 Screen Editor

EDC Info — Used when a processor has been configured with multiple indexes in EDC. The terminal must be assigned to a particular processor index. For example, if there is a CES, CES2, and CES3 processor defined in EDC, and this terminal needs to be assigned to the CES2 processor, enter INDEX=2 in the 'EDC Info' text box. If there is only one processor index for the processor, no entry is required in this text box. All configuration of EDC takes place outside the Aloha system.



Refer to Chapter 5, Menu Maintenance Functions, for more information about creating and editing order entry, administrative, and other screens used in the restaurant.

Readers Subtab

Settings on the Readers subtab enable you to define any of several input devices that are used to identify customers or employees, and to interface with their credit card companies, as appropriate. Select the Readers subtab to display these settings, shown in Figure 8-4:

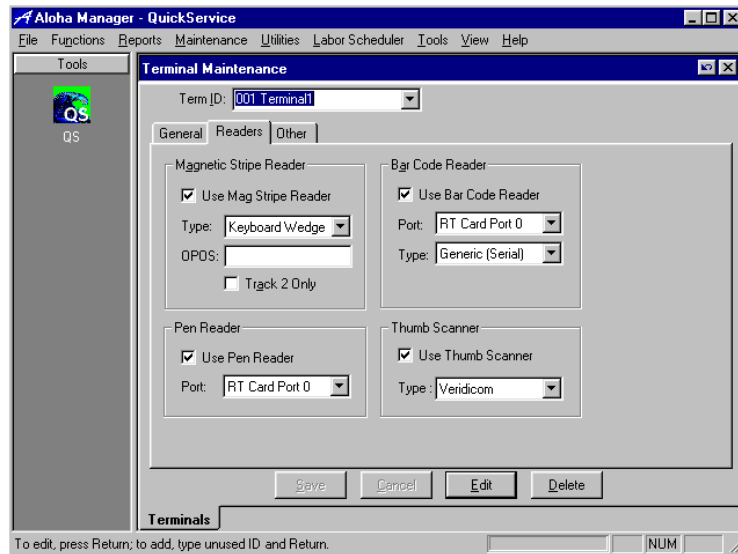


Figure 8-4 Terminals, Readers Subtab

Magnetic Stripe Reader Inset

Use Mag Stripe Reader — Indicates a magnetic stripe reader is physically attached to the defined terminal. If a magnetic stripe reader is not used, this setting should be cleared.

Type — Defines the comparable type of magnetic stripe reader attached to the terminal. Select the type of magnetic stripe reader from the drop-down list.

OPOS — If an OPOS MSR is selected as the MSR type, the OPOS text box becomes available. This must contain the name of the OPOS MSR driver file as it appears in the Registry Editor (Note: The driver files must be installed first). For example, the OPOS name for a Panasonic MSR would be JS-9000MSR. To determine this, access a DOS command line, type REGEDIT and press Enter. The Registry Editor displays. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and MSR. The installed drivers display under MSR. Determine the name of the driver file to be used and enter it into the 'OPOS' text box.

Track Two Only — Indicates when the magnetic stripe reader uses track two.

Bar Code Reader Inset

Use Bar Code Reader — Indicates a bar code reader is physically attached to the defined terminal. If a bar code reader is not used, this setting should be cleared.

Port — Specifies the port where the bar code reader is attached to the terminal. Select the port from the drop-down list. The system uses the reader port setting when the 'Use Bar Code Reader' check box is selected.

Type — Defines the type of bar code reader attached to the terminal. Select the type of bar code reader from the drop-down list.

Pen Reader Inset

The settings in this inset enable you to activate pen readers for use with the system. After setting up each terminal, as appropriate, to use a pen reader, you must also enable managers to assign pen readers to individual employees.



This setting is located in Maintenance > Labor > Access Levels on the Employees subtab (Figure 8-7).

Use Pen Reader — Enables pen readers in the system.

Port — Defines the port to be used by the pen reader.

Refer to the Pen Reader Setup Requirements section in this chapter for more information about how to use this type of equipment with the Aloha system, and about how the system searches for a match to a pen inserted into the reader.

Thumb Scanner Inset

The settings in this inset enable you to activate and define a thumb scanner for use with the system. The Aloha system makes use of biometrics technology, so no actual thumb prints are stored in the system. A pattern of ‘landmarks’ is used when comparing an individual against the database.

The Aloha system uses the identification process, rather than verification. Identification as a process is potentially faster, in that it is a one-step process. The system reads the scanned image, the thumb, then proceeds through the previously defined levels in the system to determine the owner of the print. Verification is a two-step process, in which the person seeking access to the system clocks or logs in, then presents his or her thumb for verification of identity against patterns stored in the database.

Refer to the Thumb Scanner Setup Requirements section in this chapter for more information about how to use this type of equipment with the Aloha system, and about how the system searches for a match to a thumb print.

Use Thumb Scanner — Enables thumb scanners in the system.

Type — Select the type of thumb scanner from the drop-down list. Veridicom is the only type of thumb scanner supported by the Aloha system, although support for other types of equipment may be added later.

Other Subtab

Settings on the Other subtab enable you to define and configure any of several output devices that are used to communicate with, or to supply change to the customer. You can also enable PIN pads for use with debit cards, on this subtab.

Select the Other subtab to display these settings, shown in Figure 8-5:

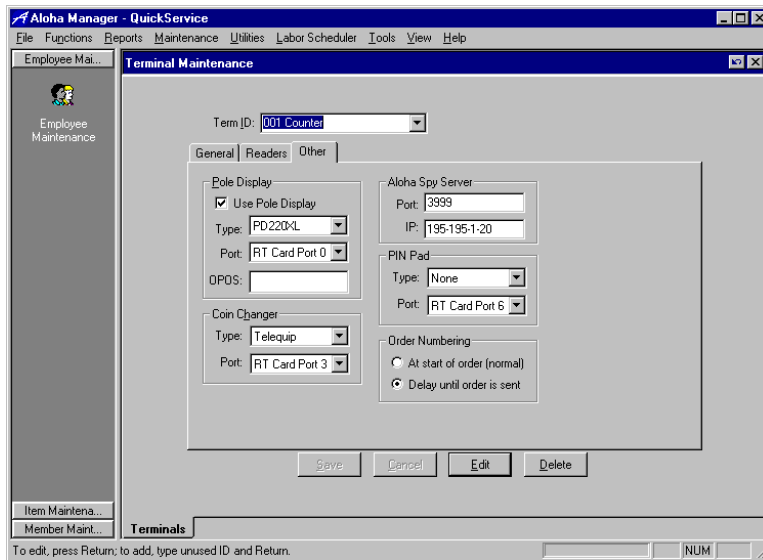


Figure 8-5 Terminals, Other Subtab

Pole Display Inset

Use Pole Display — Indicates a pole display is physically attached to the defined terminal. Select the type of pole display from the drop-down list. If a pole display is not used, this setting should be cleared.

Type — Defines the standard types of pole displays supported by the Aloha system. Select the pole display type from the drop-down list.

Port — Specifies the port where the pole display is connected to the terminal. Select the port from the drop-down list. The system uses the pole port setting when the 'Use Pole Display' check box is activated.

OPOS — If an OPOS Line Display is selected for the pole type, the OPOS text box becomes available. This text box must contain the name of the OPOS driver file as it appears in the Registry Editor (Note: The driver files must be installed first.) For example, the OPOS name for a Panasonic Pole Display would be JS-9000LD. To determine the OPOS name, access a DOS command line, type REGEDIT and press Enter. The Registry Editor displays. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and LineDisplay. The installed drivers display under LineDisplay. Determine the name of the driver file to be used and enter it into the 'OPOS' text box.

Coin Changer Inset

Type — Defines the comparable type of coin changer attached to the terminal. Select the type of coin changer from the drop-down list.

Port — Specifies the port where the coin changer is connected. Select the port from the drop-down list.

Aloha Spy Server Inset

The Aloha system has the capability of interfacing with the TVS security system. The TVS environment must be set up on the file server before the interface parameters are specified here.



The TVS security system must be enabled in Store Settings. Select Maintenance > Store Settings, then select Security from the Group drop-down list. Select 'Use Aloha Spy' on the POS Security sub-tab.

Port — Enter the TCP port value, using the same value that was established for the TVS security system on the file server.

IP — Enter the IP address or the name of the computer being used as the file server.

PIN Pad Inset

The settings in this inset configure the system to use a keypad for accepting a PIN number, as input by the customer. This type of keypad works in conjunction with debit cards.

Type — Identifies the specific type of equipment attached to the terminal. Currently, the Aloha system supports the Verifone 1000, Everest, and Everest Plus. Everest and Everest Plus uses the same emulation, so they are not listed as separate devices. Select either Verifone 1000 or Verifone Everest.

Port — Defines the physical port to which the PIN pad is attached.

Order Numbering Inset

This inset enables you to determine when a number is assigned to an order, as it enters the mix of order queues. This ability helps to ensure that an order with relatively few items can be moved ahead of a larger or more complex order. The first criterion by which an order may be moved ahead in the queue is the number assigned to the order. If the system is configured for load balancing queues, the nature of the order is considered after the order number.

At start of order (normal) — Causes the system to assign a number to a new order when the order is initiated. Orders receive numbers in sequence as they are opened, regardless of the nature of the order.

Delay until order is sent — Causes the system to delay assigning a number to a new order after the order is complete, and the order is actually sent to the kitchen for preparation.

This inset makes it possible to use ‘serpentine’ drive-through order queues with separate cashier and pickup windows. In this arrangement, drivers place orders in a side-by-side configuration. Drivers with simple orders, or orders with few items, can move ahead in the line when other drivers are placing large or complicated orders. To correctly enable this order scheme, you must also disable the ‘Use Store Wide Order Numbering’ setting in Maintenance > Store Settings > Printing, on the Check Content 2 subtab.

Thumb Scanner Setup Requirements

After setting up each terminal, as appropriate, to use a thumb scanner, you must also complete the steps outlined below to activate this capability in your system. You must define which employees must use the thumb scanner for log in or clock in purposes. You must also select the managers access level and enable thumb print enrollment capability.

Employee Setup

Each employee that is required to use the thumb print scanner must be designated as such in Employee Maintenance. Select Maintenance > Labor > Employees to display the Employees function tab, as shown in Figure 8-6:

The screenshot shows the 'Employee Maintenance' window in the 'Aloha Manager - QuickService' application. The window has a menu bar with 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. The 'Employee Maintenance' subtab is active, showing a list of employees on the left and a detailed form for editing an employee on the right. The employee selected is 'Roberts, Julia 0444'. The form includes fields for 'ID #', 'Address', 'Last Name', 'First Name', 'Middle', 'Nickname', 'Birthdate', 'Start Date', 'Export ID #', 'City / Town', 'State', 'Postal Code', and 'Telephone'. There are also checkboxes for 'Must use Thumb Scanner - Clock In' and 'Must use Thumb Scanner - Log In/UIT'. The 'Employees' tab is selected at the bottom.

Employee	Job Codes	Zap	Delivery	Tax	Back Office Security
Roberts, Julia 0444					

ID #: 484-33-2199 Address: 235 NE Loop 820 #500

Last Name: Roberts First Name: Julia Middle: Nickname: Red City / Town: Hurst State: TX Postal Code: 76053 Telephone: 800-555-1212

Birthdate: 01/01/1948 Start Date: 01/01/1999 Export ID #: 0

☒ Must use Thumb Scanner - Clock In
☒ Must use Thumb Scanner - Log In/UIT

Save Cancel Edit Delete

Employees

To edit, press Return; to add, type unused ID and Return.

Figure 8-6 Employees, Thumb Scanner Setting

On the Employee subtab, to make use of the thumb scanner mandatory, enable one or both of the settings that relate to the thumb scanner.

Must use Thumb Scanner - Clock In — Requires the selected employee to use the thumb scanner to clock in. The employee clocks out in conjunction with check out and other policies.

Must use Thumb Scanner - Log In/JIT — Requires the selected employee to use the thumb scanner to log in to the Aloha system each time. If the employee touches ‘Exit’ to let another person use the terminal, or to perform other tasks, the thumb scanner must be used to return to active use of the terminal.

These settings are mutually exclusive with regard to the ‘Must Use Mag Cards’ setting. You can use one or both of the thumb scanner settings, or you can enable the mag card setting, but you cannot use both types of equipment at the same time.

Access Levels

In addition to enabling the hardware and defining which employees must use thumb scanners, at least one manager must be given access to enroll new thumb print images in the system. This permission setting is located in Maintenance > Labor > Access Levels, as shown in Figure 8-7:

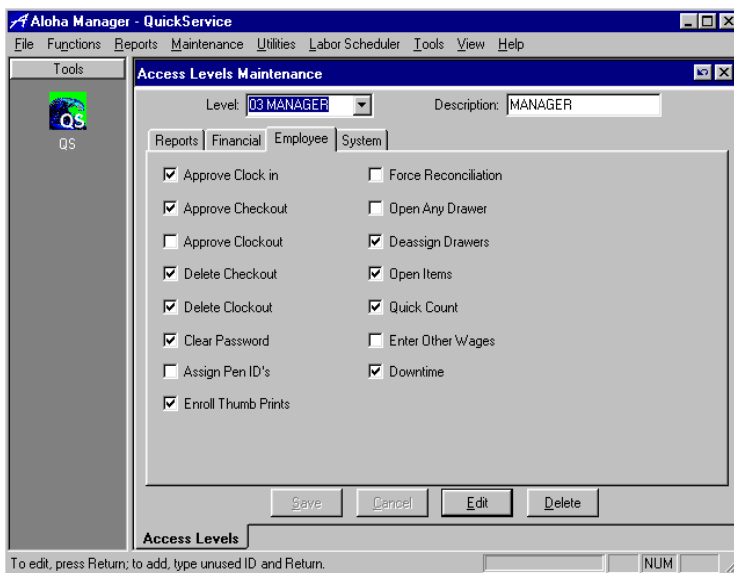


Figure 8-7 Access Levels, Enroll Thumb Prints



Managers with Enroll Thumb Prints enabled may add thumb prints to the system from an FOH terminal by touching the Enroll Thumb Prints button. However, if a thumb scanner device is not connected to the terminal, the Enroll button results in no action.

To give a manager the ability to enroll thumb prints:

1. Select the **access level** to which the manager is assigned.
2. Select the **Employee** subtab.
3. Select **'Enroll Thumb Prints'**.
4. Click **Save**.

A button must be added to a screen to which the manager has access, for the purpose of enrolling thumb prints. If the panel is one to which managers have exclusive access, the remainder of employees never see the button. When a manager touches the button, the system checks the access level granted to the individual manager. If this function is enabled in his or her profile, the enrollment process begins. If no scanner is attached to the terminal in use at the time, the system takes no action.

After all settings are in place, you must select Utilities > Refresh Data to transfer the new information to the FOH terminals. After the data refresh is complete, the manager may enroll thumb prints, and employees may clock in for work, or log in to the Aloha system using the thumb scanner.

When an employee uses the thumb scanner, the system proceeds in accordance with a hierarchy of employee categories, to minimize the amount of time the system spends looking through employee records. Using the identification technique, the system begins its search at the top of the hierarchy, and moves to successive levels until it locates the employee who is using the thumb scanner.

The system uses the following search hierarchy when identifying employees:

1. The system searches first for employees who are clocked in, have used this specific terminal for the current day, and have server or bartender job codes.

2. The system next searches for employees who are clocked in, beginning with those with server or bartender job codes, then for employees with any other job codes.
3. The system finally searches through all employees who are not clocked in.
4. The system takes no action if no match is found for the thumb print.

Pen Reader Setup Requirements

The pen reader feature enables the use of an electronic ‘pen’, styled much like a typical ball-point pen, for employee identification for purposes of clock-in and log-in access to the Aloha system. After setting up each terminal, as appropriate, to use a pen reader, you must give managers permission to enroll pen IDs into the system and assign them to individual employees.

Access Levels

To enable pen identification enrollment capability, select Maintenance > Labor > Access Labels to display the Access Levels function tab, then select the Employees subtab to gain access to the ‘Assign Pen ID’s’ setting, as shown in Figure 8-8:

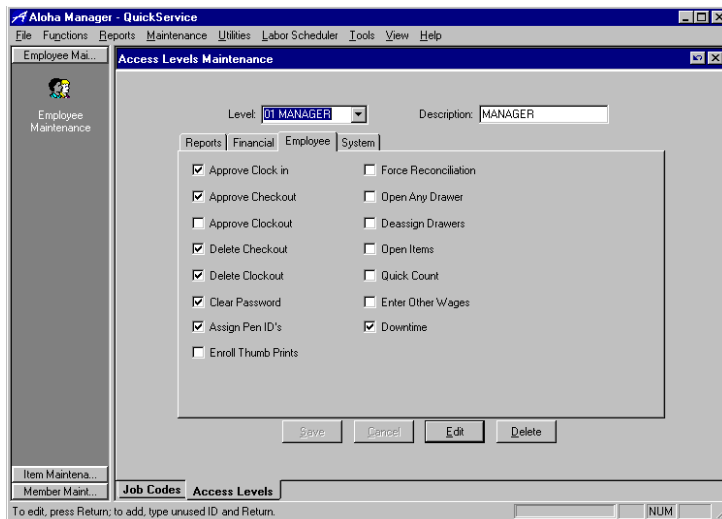


Figure 8-8 Access Levels, Assign Pen IDs

To give a manager the ability to assign pen IDs:

1. Select the **access level** to which the manager is assigned.
2. Select the **Employee** subtab.
3. Select '**Assign Pen ID's**'.
4. Click **Save**.

A button must be added to a screen to which the manager has access, for the purpose of assigning pen IDs. If the panel is one to which managers have exclusive access, the remainder of employees never see the button. When a manager touches the button, the system checks the access level granted to the individual manager. If this function is enabled in his or her profile, the pen ID assignment process begins.

After all settings are in place, you must select Utilities > Refresh Data to transfer the new information to the FOH terminals. After the data refresh is complete, the manager may assign pen IDs, and employees may clock in for work, or log in to the Aloha system using the identification pens to which they are assigned.

Cash Drawers

Due to hardware considerations, cash drawers are attached to printers or to computer terminals. When the system accesses a cash drawer, it sends a signal to the assigned cash drawer in one of two ways:

- When the cash drawer is connected to the printer designated for the order entry terminal, the printer signals the drawer after receiving the initial signal from the terminal.
- When the cash drawer is connected directly to the order entry terminal, the terminal signals the drawer.

Select Maintenance > Hardware > Cash Drawers to display the Cash Drawers function tab, as shown in Figure 8-9:

The screenshot shows the 'Cash Drawer Maintenance' window in the 'Aloha Manager - QuickService' application. The window has a menu bar with 'File', 'Functions', 'Reports', 'Maintenance', 'Utilities', 'Labor Scheduler', 'Tools', 'View', and 'Help'. On the left is a sidebar with 'Employee Maintenance' and 'Cash Drawers' (selected). The main area contains several input fields: 'Drawer ID' (001 Counter), 'Description' (Counter), 'Drawer Type' (Serial 225 32000), 'Printer Interface' (Printer: None (00), Drawer Number: 1), 'Serial Interface' (Compulsory Method: CTS (1)), and 'Other Interfaces' (Terminal: 001 Counter, Port: RT Card Port 3, QPOS). At the bottom are 'Save', 'Cancel', 'Edit', and 'Delete' buttons. A status bar at the very bottom says 'To edit, press Return; to add, type unused ID and Return.' and has a 'NUM' indicator.

Figure 8-9 Cash Drawers

Drawer ID — Holds a three-digit number that together with 'Description' uniquely identifies each Cash Drawer record. To create a new record, enter an

unused number and press Enter. To edit an existing record, scroll through the Drawer ID drop-down list, select the record to edit and press Enter.

Description — Enter a descriptive name for the Cash Drawer record. Naming conventions are entirely up to the user. However, it is suggested that the name be descriptive or reflect the location of the cash drawer.

Drawer Type — Defines the drawer type that is attached to the system. The list contains the names of cash drawer types that currently work with the Aloha system.

Serial Interface Inset

Compulsory Method — Activated only when Serial 223 32000 is selected as the Drawer Type. Select one of the following options:

CTS — Clear to Send is pin 8 for a 9-pin serial port, and pin 5 for a 25-pin serial port.

RI — Ring Indicator is pin 9 for a 9-pin serial port, and pin 22 for a 25-pin serial port.

Note: If using CTS or RI and a drawer is not attached to the selected port, or if the drawer does not support this method, the system will not allow cashiers to input an order or make a no sale. The system detects that the drawer is open.

Printer Interface Inset

Printer — Specifies the printer to which the cash drawer is connected. This selection is only active when a printer interface cash drawer type is selected.

Drawer Number — Determines the connection order number of the cash drawer device. The value for the first drawer connected is 1, and the value for the second is 2. Only two drawers can be connected to any one printer. This selection is only active when a printer interface cash drawer type is selected.

Other Interfaces

Terminal — Defines the terminal number to which the cash drawer is connected. This selection is only active when a non-printer interface cash drawer type is selected.

Port — Specifies the serial port corresponding to the physical connection of the cash drawer. This selection is only active when a non-printer interface cash drawer type is selected.

OPOS — If OPOS Cash Drawer is selected as the Drawer Type, the 'OPOS' text box becomes available. This text box must contain the name of the OPOS cash drawer driver file as it appears in the Registry Editor. (Note: The driver files must be installed first.) For example, the OPOS name for a Panasonic cash drawer could be either JD-9000CD1 or JD-9000CD2. To determine this, access a DOS command line, type REGEDIT and press Enter. The Registry Editor displays. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and CashDrawer. The installed drivers display under CashDrawer. Determine the name of the driver file to be used and enter it into the 'OPOS' text box.

Printers

The Printers function tab is used to define the physical connections between terminals and printing devices. Each printer must be connected to a terminal and should have an assigned backup printer to use in the event of hardware failure. After printers are defined, they are grouped together logically in Maintenance > Hardware > Printer Groups for use by other components of the Aloha system.

Select Maintenance > Hardware > Printers to display the Printers function tab, as shown in Figure 8-10:

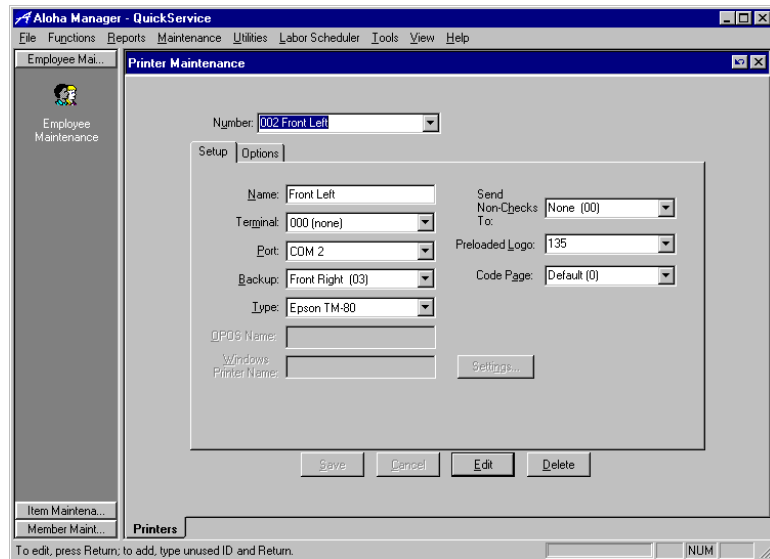


Figure 8-10 Printers, Setup Subtab

Number — Holds a three-digit number that together with 'Name' uniquely identifies each printer record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Number drop-down list, select the record to edit and press Enter.

The Printers function tab provides the following subtabs which are used to maintain printer records: Setup, and Options.

Setup Subtab

The Setup subtab enables you to configure the printer to take maximum advantages of the features and flexibility built into the printer. Select the Setup subtab from the Printers function tab (Figure 8-10) to configure a new printer or to modify the configuration of an existing printer

Name — Enter a descriptive name for the printer. Printer naming conventions are set by the user. However, it is suggested that the printer name be descriptive or reflect its physical location, such as Kitchen, Pantry, Patio, or Dining.

Terminal — Reflects the physical connection between the printer and terminal. Select the terminal to which the printer is connected from the drop-down list.

Port — Specifies the serial and RT Card ports where the defined printer is connected. This setting must reflect the hardware configuration.

Backup — Defines a substitute printer for the defined printer in the event of hardware failure. When the defined printer fails, the system reroutes output to the backup printer after the time interval in the 'Reroute Timeout' text box.

Type — Contains a list of the typical printers encountered in an Aloha system environment. Select the printer type from the drop-down list.



For all slip printers, define the 'Prefix Lines' and 'Lines Per Sheet' in Store Settings > Printing Group > Check Style. Otherwise only one line at a time prints and feeds the paper until it runs out.

OPOS Name — If an OPOS Printer is selected as the printer type, the 'OPOS' text box becomes available. This text box must contain the name of the OPOS printer driver file as it appears in the Registry Editor (Note: The driver files must be installed first). To determine this, access a DOS command line, type REGEDIT and press Enter. The Registry Editor displays. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and MSR. The installed drivers display under MSR. Determine the name of the driver file to be used and enter it into the 'OPOS' text box.

Windows Printer Name — Anything that can print in the FOH can also be printed to a printer that has been set up in the Microsoft® Windows® operating system. The Windows Printer must be selected as the printer type from the 'Type' drop-down list, thus activating the 'Windows Printer Name' text box. This text box is used to link an Aloha printer definition to a Windows printer definition. It is very important that the printer name input in this field match the printer name assigned in Windows under Start > Settings > Printers. For Windows 95 (all printers) and Windows NT® (local printers), the printer name should be entered here as entered under Printers in Windows. For example: If the Windows printer is called HP LaserJet Plus, then the 'Windows Printer Name' text box must contain HP LaserJet Plus. On Windows NT systems (network printers), the printer name includes the server name. In this case, the 'Windows Printer Name' text box must contain the path. For example, if the printer name on an NT system is HP LaserJet Plus on Server01, the text box should say \\Server01\HP LaserJet Plus. (Note: The Windows Printer Name feature works only if the printer drivers for the Windows printer are installed on the FOH terminal.)

Settings — Activated only when 'Windows Printer Name' is selected. Displays a secondary dialog box that permits margin, column, and font settings to be defined. Press Tab to move from one setting to the next. Make all desired changes, then click Save to save the changes. A Select Font dialog box is also available when using a Windows printer. The Select Font dialog box permits the font, font style, and font size to be defined. To make changes, scroll through the selection lists and highlight the desired font, font style, and font size. When finished, click OK.

Send Non-Checks to — Establishes the printer to which non-check print jobs are to be sent. Print jobs of this nature would include reports generated from an order entry terminal. Generally used with slip printing, but not required. Any printer can send non-checks to another printer.

Preloaded Logo — Takes advantage of preloaded logos stored in non-volatile RAM (NVRAM) in certain models of printers. This check box is available only when a printer containing preloaded logos is selected from the Type drop-down list. To determine the logo to use, consult the literature received with the printer or consult the printer manufacturer.

Code Page — Used to associate the printer to a set of character codes for another language on Epson printers. We currently support the Euro (prints the Euro monetary symbol) and Cyrillic (Russian) character sets.



The Code Page text box specifies the character set for the printer, but you must also specify the character set for the terminal. To specify the character set for the terminal, select Start > Settings > Control Panel and double-click Regional Options. Select the language setting for the system.

Use the following table to determine the settings for the corresponding language:

Supported Code Page	Printer Setting	Terminal Setting
Euro	858	Western Europe and U.S. (default)
Cyrillic (Russian)	866	Cyrillic

Options Subtab

The Options subtab provides configuration settings that relate more to the restaurant environment, such as transfer and timeout functions. Select the Options subtab from the Printers function tab to complete the configuration of

a new printer or to modify the configuration of an existing printer, as shown in Figure 8-11:

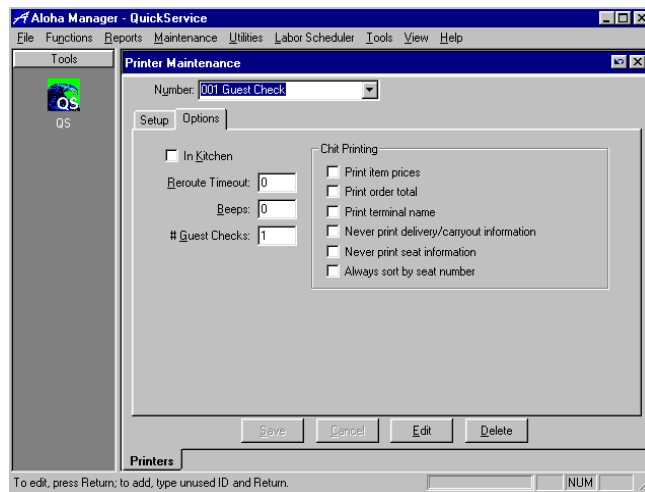


Figure 8-11 Printers, Options Subtab

In Kitchen — Items routed to a printer group containing a printer that has 'In Kitchen' selected also print at the expeditor printer. Specify the expeditor

printer in the Printing group of Maintenance > Store Settings, as shown in Figure 8-12:

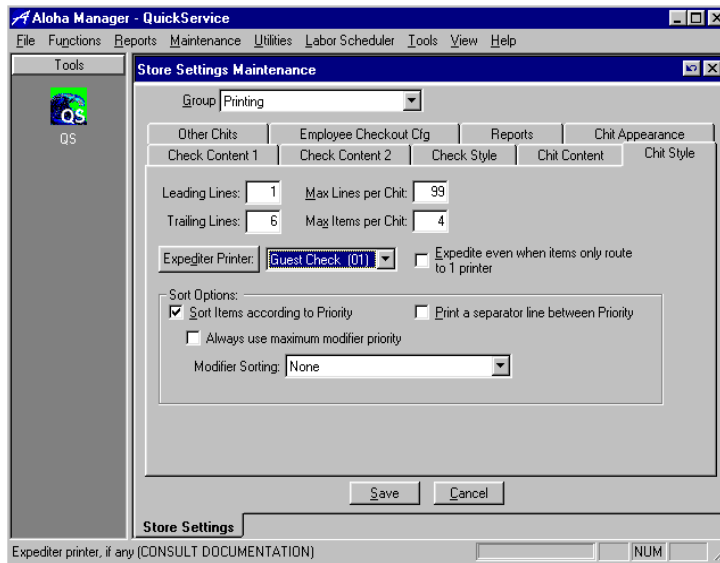


Figure 8-12 Enable Expedite Printer

Using this method, only orders that are 'split' to multiple printer groups print to the expeditor printer for quality control. **Note:** This method eliminates the need to include the expeditor printer in printer groups.

Reroute Timeout — Defines the amount of time, in seconds, that the system will wait before rerouting the print job from the defined printer to the Backup printer, as defined on the Setup subtab.

Beeps — Sets the number of audible signals emitted by the printer each time a chit is printed. This feature is only available on some printer models. Some printers use an annunciator connected to the cash drawer port on the printer to create the beep sounds. Consult the manufacturer of your printer for more information.

In all cases, the beeps are activated by the same signal that opens a cash drawer. If a cash drawer is attached to the printer, verify that this setting is '0' to prevent the cash drawer from opening each time a chit is printed.

Guest Checks — Defines the number of guest checks to print.

Chit Printing Inset

The settings in this inset enable you to define the contents of the chit, as to what to include or to exclude. These settings provide considerable flexibility in designing a chit that contains information necessary for your business, but excludes unnecessary information.

Print item prices — Causes the system to print item prices on the chit.

Print order total — Causes the system to print the order total on the chit.

Print terminal name — Causes the system to print on the chit, the name by which the order terminal is identified in the system.

Never print delivery/carryout information — Prevents the system from printing delivery or carryout information on the chit.

Never print seat information — Prevents the system from printing seat information on the chit.

Always sort by seat number — Causes the system to sort chit information by seat number, when seat numbering is in use.

Printer Configuration

Certain interactions take place between the Aloha system and computer operating systems, such as Microsoft Windows NT® and Windows® 95 and Windows® 98, with regard to printers. It is very important to make allowances for these interactions before setting a defined printer as active.

Windows NT

Parallel printers are not supported on order entry terminals with Windows NT installed as their operating system. If the printer runs out of paper or is off line, it will lock up the FOH system. Serial printers are recommended for order entry terminals using Windows NT.

Windows 95 and Windows 98

When a printer is attached to a serial port on an order entry terminal using Windows 95 or Windows 98, FIFO must be turned off if this printer is to receive output correctly from the Aloha system. Failure to do this results in erratic printing behavior, where characters are dropped.

To turn off FIFO:

1. Open the Control Panel function on your computer.
2. Double-click System.
3. Select the Device Manager tab.
4. Click the '+' next to Ports to reveal the specific ports.
5. Select the specific port that needs to be changed.
6. Click Properties.
7. Select the Port Settings tab.
8. Click Advanced.
9. Make sure the Use FIFO Buffers check box is not active.
10. After making changes, click OK as many times as necessary to close the System Properties dialog box.
11. Reboot the computer before attempting to print.

Printer Groups

The Printer Groups feature allows printers to be combined into logical groups after they are defined in Maintenance > Hardware > Printers. Most components of the Aloha system use printer groups instead of individual printers to give added flexibility to the system.

Printer Groups are a powerful feature of the Aloha system. The user can handle virtually any printing situation by routing items to a dedicated Printer Group, which can then be rerouted without affecting other items.

Creating printer groups has less to do with physical printer layout and more to do with the logical organization of printers in the restaurant setting. While printers can be considered a hardware issue, printer groups are operational issues. For example, if an order prints to multiple printers in the kitchen, the entire order can be sent to an 'expediter' printer for quality control before it is received by the customer. This is accomplished by including the 'expediter' printer in each printer group. For this reason, well-considered printer group planning can take significant advantage of the efficiencies built into the Aloha system.

Select Maintenance > Hardware > Printer Groups to display the Printer Groups function tab, shown in Figure 8-13:

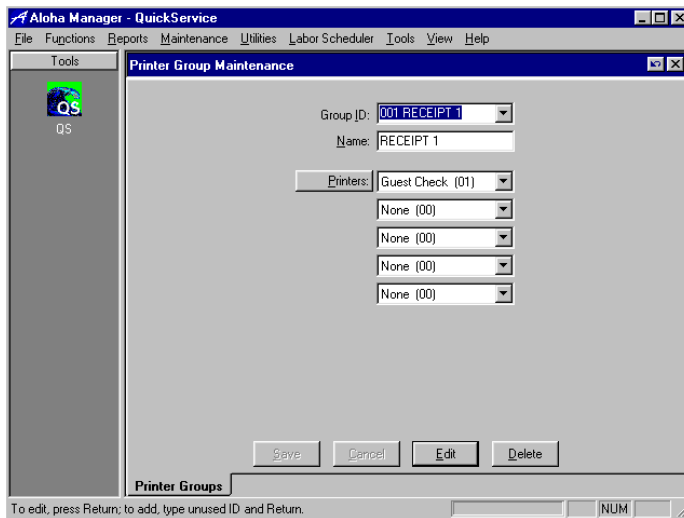


Figure 8-13 Printer Groups

Group ID — Holds a three-digit number that together with 'Name' uniquely identifies each printer group. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Group ID drop-down list, select the record to edit and press Enter.

Name — Enter a descriptive name for the printer group. Printer group naming conventions are entirely up to the user. However, it is suggested that the name be descriptive or reflect printer group tasks.

Printers — Select one or more of the previously defined printers to assign to the printer group from the drop-down lists. Each printer group can have up to five assigned printers.

Printers Button

Click Printers to open the Printers function tab. Here you can perform maintenance in the Printers function, including add new records if the one you need is not there.

Labels

An important feature of any take-out or delivery restaurant is the ability to know what is in a container without opening it. To use this feature in the Aloha system, at least one label must be defined, and the label ID added to items that require a printed label.

Select Maintenance > Hardware > Labels to display the Labels function tab, as shown in Figure 8-14:

The screenshot shows the 'Label Maintenance' window in the Aloha Manager - QuickService application. The window is titled 'Label Maintenance' and has a menu bar with options: File, Functions, Reports, Maintenance, Utilities, Labor Scheduler, Tools, View, Help. Below the menu bar is a toolbar with 'Tools' and 'OS' buttons. The main content area is divided into several sections. On the left, there's a 'Label ID' dropdown menu showing '00', a 'Label Name' text field, a 'Printer Group ID' dropdown menu showing 'None (0)', and a 'Text Size' dropdown menu showing 'Large'. Below these is a 'Label Type' section with two radio buttons: 'Item' (selected) and 'Guest Check'. To the right of these is a 'Print Options' section with four checkboxes: 'Print Barcode?', 'Print Item Price?', 'Print Name?', and 'Print Address?'. Further right is a 'Print Area' section with three fields: 'Label Width' (0.0000 inches), 'Label Height' (0.0000 inches), and 'Margin' (0.0000 inches). Below the 'Print Area' is a 'Filter by Order Mode' section with a checkbox 'Print Label for ALL Order Modes?' and four dropdown menus for 'Order Mode #1', 'Order Mode #2', 'Order Mode #3', and 'Order Mode #4', all showing 'None (0)'. At the bottom of the main area are four buttons: 'Save', 'Cancel', 'Edit', and 'Delete'. Below the main area is a status bar with the text 'To edit, press Return; to add, type unused ID and Return.' and a 'NUM' indicator.

Figure 8-14 Labels

Label ID — Holds a two-digit number that together with 'Label Name' uniquely identifies each label. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Label ID drop-down list, select the record to edit and press Enter.

Label Name — Holds a descriptive name for the label record.

Printer Group ID — Defines the locations where the label will print.

Printer Group ID Button

Click Printer Group ID to display the Printer Groups function tab. Here you can perform maintenance in the printer group function, including add new records if the printer group you need is not there.

Text Size — Defines the default text size printed on the label. Text sizes of small, medium, and large are available on the drop-down list. Select the text size that best suits your needs.

Print Area Inset

The settings available in this inset enable you to specify the size label you are using, and the margin to be reserved on the label.

Label Width — Defines the width of the label. This information is provided by the label manufacturer.

Label Height — Defines the height of the label. This information is provided by the label manufacturer.

Margin — Defines the desired width of the label margins. Information about margin limits is provided by the label manufacturer.

Label Type Inset

The settings available in this inset enable you to specify the type of label to print.

Item — Prints a label that contains information about the item in the intended container. If ‘Print Barcode?’ is selected in the Print Options inset, the label prints with a barcode that, when scanned, returns information about the item. The system only prints labels for items assigned to a specific label. If more than one item is included in the container, a label prints for each item in the order. Item information on the label is then used to ring up the item, but no guest check information is conveyed by the label.

Guest Check — Prints a label that contains guest check information about the item or items in the intended container. If ‘Print Barcode?’ is selected in the Print Options inset, the label prints with a barcode that, when scanned, returns information that is used to pull up the customer’s check. The check can then be closed if the guest is in the store, or it can be transferred to a driver for delivery. If ‘Guest Check’ is selected, it is not possible to assign the label to a menu item. If the selected label is subsequently changed to ‘Guest Check’, prior label assignments to menu items involving the label become invalid.

Item — Prints a label that describes only the item in the intended container. When multiple items are included, a label is printed for each item. When a barcode label is printed, the information encoded relates only to the item in the container, one label per item.

Guest Check — Prints a label that relates the order to the guest check by means of a barcode only to the guest check as currently defined in your business. Selecting ‘Guest Check’ disables the ability to assign a label to an item in Maintenance > Items.

Print Options Inset

The settings in this inset enable you to specify the contents of the label.

Print Barcode? — Enables barcode printing on the label. When scanned, the barcode causes the system to display information about the item or the full guest check, depending upon the setting in the Label Type inset.

Print Item Price? — Prints an item price on the label. This selection is unavailable if a label type of Guest Check is selected.

Print Name? — Prints a customer name on the label.

Print Address? — Prints a customer address on the label.

Filter by Order Mode Inset

Settings in this inset enable you to specify the order modes that cause labels to print.

Print Label for ALL Order Modes? — Prints a label for all order modes. If this check box is selected, the order mode drop-down lists are not available.

Order Modes — Causes a label to print for any order mode specified in these drop-down lists. When the 'Print Label for ALL Order Modes' selection is not selected, the system looks at the order mode selections to determine the order modes which require a label.

Order Mode #1 through #4 Buttons

Click any of the Order Mode buttons to display the Order Modes function tab. Here you can perform maintenance in the printer order mode function, including add new records if the order mode you need is not there.

After defining the label, items requiring a label need to be edited to include the 'Label ID' to print when the item is ordered. Select Maintenance > Menu > Item to add the 'Label ID' to items requiring printed labels. Select the item, then select the Miscellaneous subtab. Make the label active in the Label inset by selecting the appropriate 'Label ID' from the drop-down list.

Video Groups

Video groups are useful for routing video signals to display devices located in specific areas of the restaurant as a group. Select Maintenance > Hardware > Video Groups to display the Video Groups function tab, as shown in Figure 8-15:

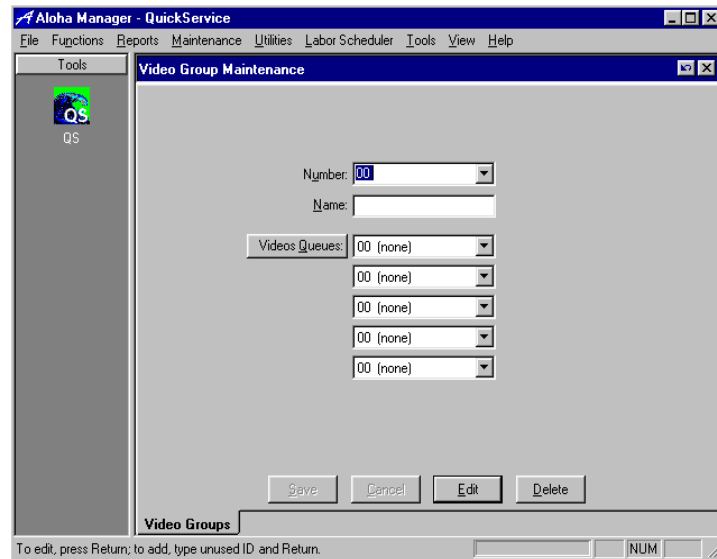


Figure 8-15 Video Groups

Group ID — Holds a three-digit number that together with 'Name' uniquely identifies each video group record. To create a new record, enter an unused number and press Enter. To edit an existing record, select it from the 'Number' drop-down list and press Enter.

Name — Holds a descriptive name for the video group.

Videos — Select up to five video display devices to which the video signal may be routed.

Video Queues

The Video Queues feature enables you to sort orders and send them to different preparation queues depending upon their source and the type of order. The following capabilities are among the features included in video queues:

- Multiple video queues are allowed.
- Input from video keypads is supported.
- Display orders on split screens.
- Random or directed order bumping.
- Load balancing queues are supported, by number of items or orders.
- Bumping between video groups is supported.

Video queues is part of the Aloha Remote Display Systems add-on to the Aloha system.



Refer to the
Interfacing
RDS with Aloha User's
Guide for more information
about the capabilities of
this feature.



Refer to the
Interfacing

RDS with Aloha User's
Guide for more information about the capabilities of this feature.

Video Devices

Video devices provide excellent ways of making your employees more productive by facilitating the quick, accurate filling and delivering of orders with rapid, clear communication within the restaurant.

This capability is available to you by purchasing a license for remote display systems, an add-on to the Aloha system. This package gives you instant access to adding and configuring video display devices to make your operations more flexible to you, and more attractive to the customer.

Some of the features of video are as follows:

- Menu item routing.
- Expedited order processing.
- Order recall.
- Random or directed order bumping.

Video Keypads

Video keypads are supported in conjunction with split-screen operation. With video keypads installed on your system, you can easily visualize the status of orders in different parts of the restaurant, and quickly bump them from one queue to another to speed up the process of order preparation.

This capability is available to you by purchasing a license for remote display systems, an add-on to the Aloha system. This package gives you enhanced order handling capabilities, to make your operations more flexible and efficient, and more attractive to the customer.



Refer to the
Interfacing
RDS with Aloha User's
Guide for more information
about the capabilities of
this feature.

Display Boards

A display board is a physical stand from which the guest places their order. It is commonly used in drive thru environments and provides a visual indication of the guest's order, including any modifications to the order, and the total purchase. The board shows what is being ordered and allows the guest to catch any errors before the order is sent to the kitchen.

Most display boards show a continually scrolling greeting message. When an employee begins taking an order, the Aloha FOH determines if a display is currently active. If so, it writes to the display when an item is rung up. Items removed from the order are also removed from the display board. This enables the customer to see exactly what the kitchen thinks was ordered, providing them the opportunity to stop the order process if something appears to be incorrect.

The number of lines showing on the display board at one time depends upon the capabilities of the installed hardware. If the order has more lines to display than the capacity of the display board, only the most recent lines show up on the display board, up to the maximum number supported by the display board.

Most of the time, messages written to the display board are generated from the connected terminal, however, it is common to have two terminals operating during peak times, where one terminal captures the order, and the other terminal captures the payment. Then when business slows, one terminal is often shut down and the remaining terminal captures both the order and receives the payment.

To provide the ability to manually reroute the destination of orders to another display board from the FOH, add a Reroute Display Board button function to a FOH panel, as explained in Panel Editor, located in Chapter 5, Menu Maintenance Functions.

To add the ability to display a 'Your Total is...' message for each order, add a Display Order Total button function to a panel or script, as explained in Panel Editor, located in Chapter 5, Menu Maintenance Functions.

To allow the system to activate a reroute at a certain time, create a Reroute Display Board event, as explained in Events, located in Chapter 7, System Maintenance Functions.

Select Maintenance > Hardware > Display Boards to open the Display Boards function tab, shown in Figure 8-16:

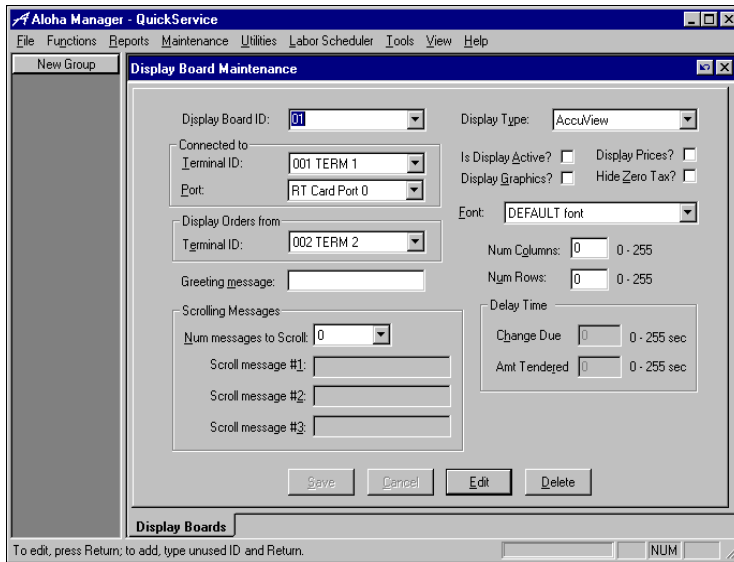


Figure 8-16 Display Boards

Display ID — Holds a two-digit number that uniquely identifies the Display Board. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Display ID drop-down list, select the record to edit and press Enter.

Connected To Inset

Terminal ID — Indicates the terminal to which the display board is attached.

Port — Indicates the port on the terminal to which the display board is physically attached. When active, the display board signal routes to the specified port.

Displays Orders From

Terminal ID — Indicates the terminal that is sending orders to this display board.

Greeting Message — Enter the desired greeting message for the display board. This text box accepts up to 100 characters, but the message truncates at the end of the message board line. Verify the length of the message visually before using it. The greeting message displays on the display board until the first menu item is ordered.

Display Type — Select the display type from the drop-down list. Select None to disable the display board.

Is Display Active? — Activates the display board, and routes the display signal to the board.

Display Graphics — Enables the use of graphics on the display board.

Display Prices? — Displays the item price on the display board.

Hide Zero Tax — Suppresses the display of tax information when the value is zero.

Font — Defines the desired font for the display board.

Num Columns — Establishes the number of display units arranged in columns as installed in the display board. This number should be between zero and 255 and is available from the manufacturer.

Num Rows — Establishes the number of display units arranged in rows as installed in the display board. This number should be between zero and 255 and is available from the manufacturer.

Scrolling Messages Inset

Num messages to Scroll — Specifies the number of scrolling messages to use. Acceptable values are numbers from zero to three. If the number is zero, no scrolling messages are active and no scrolling message text boxes are available. If the number is three, all three scrolling message text boxes are available.

Scroll message #1 — Holds the first scrolling message. This text box accepts up to 100 characters, but the message truncates at the end of the message board line. Verify the length of the message visually before using it.

Scroll message #2 — Holds the second scrolling message. This text box accepts up to 100 characters, but the message truncates at the end of the message board line. Verify the length of the message visually before using it.

Scroll message #3 — Holds the third scrolling message. This text box accepts up to 100 characters, but the message truncates at the end of the message board line. Verify the length of the message visually before using it.

Delay Time Inset

Change Due — Specifies the number of seconds the amount of change that is to be returned to the customer lingers on the display board before being cleared by the system.

Amount Tendered — Specifies the number of seconds the amount of money received from the customer lingers on the display board before being cleared by the system.



More detailed
information

about these features is available in the Aloha Accessories User's Guide.

Accessories

With Accessories, an add-on to the Aloha system, you instantly gain access to the tools needed to effectively communicate with cash card devices, drink dispensers, and scales.

Cash Cards

Provides customers more choices in convenient payment methods.

Drink Dispensers

Assures that every liquor drink poured is accounted for accurately, and eliminates the potential for an employee to over pour a drink, or forget to ring up a drink.

Scales and Tares

Allows weight measurements from a scale to be brought forward to the FOH. The total price of the product is then calculated based on the weight (less the tare weight) times the unit price.

More detailed information about these features is available in the Accessories manual.

Message Maintenance Functions

This chapter discusses the features available on the Messages menu. These are used to generate messages for communicating with individual employees, the restaurant staff, or the guests.

Main Screen.....	9-4
Guest Check	9-6
Clock In Information.....	9-8



The selections available in the Messages menu allow the creation of different types of messages. These messages are displayed on hardware devices, such as order entry terminals and display poles. Messages on guest checks can also be set from the Messages menu. Optimal use of the Messages feature permits the restaurant to target communications to specific areas of the restaurant, promote sales and special offerings, encourage employees in their daily tasks, and add a personal touch to otherwise impersonal machines.

You can use preprogrammed events available in the Aloha POS system to make messages display or print in desired locations. Select Maintenance > System > Events to schedule events as needed.

Select Maintenance > Messages to display the Messages menu:



Refer to Chapter 7, System Maintenance Functions, for information about setting Events.

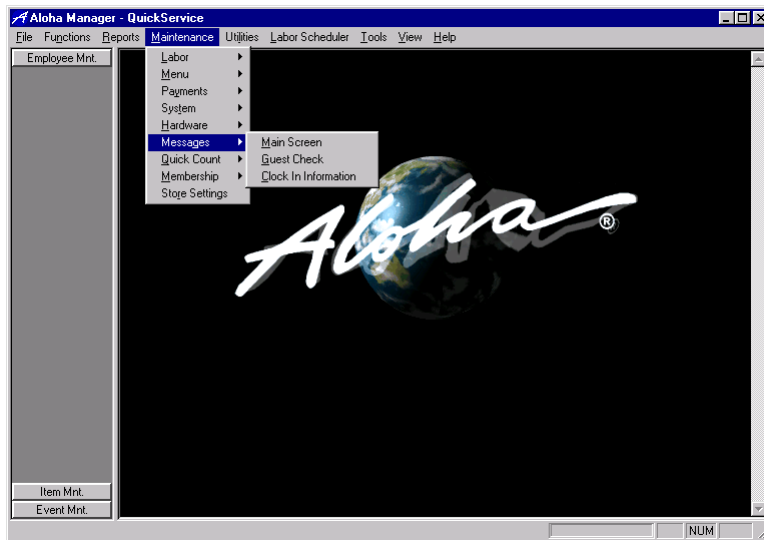


Figure 9-1

In this chapter you learn how to:

- Create messages to greet customers.
- Create messages to print on guest checks.
- Cause messages to display on a pole or screen device.
- Create messages for all employees to view when they clock in.

Main Screen

Main Screen Messages display on the main order entry terminal screen. If a pole display is attached to the terminal and is active, the message also displays there. Main screen messages are active by default or by selection. Select Maintenance > System > Events to specify messages for display. Select the following events, as appropriate to your objectives:

- (11) Set Left Message
- (12) Set Right Message

It is not necessary to select events to display messages on the main screen. If no events are selected, the first defined message displays on the left side of the order entry terminal log-in screen and the second defined message displays on the right side of the screen.

Select Maintenance > Messages > Main Screen to display the Main Screen function tab:

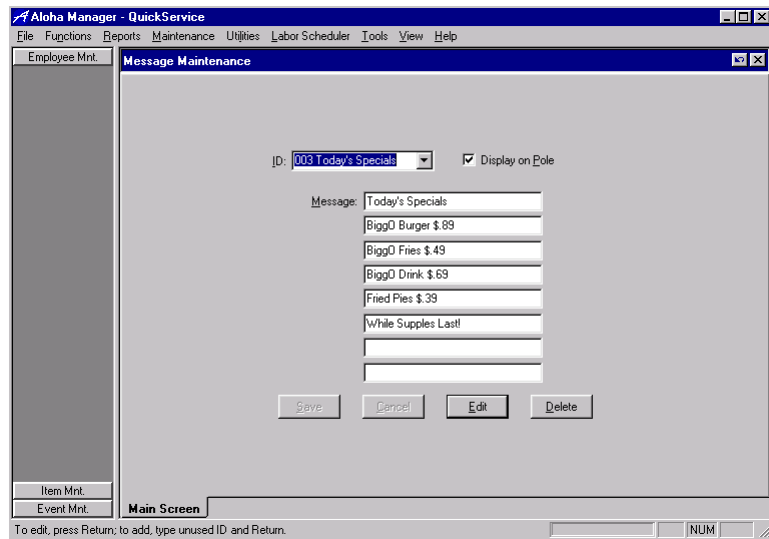


Figure 9-2 Main Screen Messages Maintenance

ID — Holds a three-digit number that together with the entry in the first message text box uniquely identifies each record. To create a new record, enter an unused ID number and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record and press Enter.

Message — Holds the message that is to display on the main screen of the order entry terminal or pole display. The entry in the first line serves as the identification name for the message. The additional lines are used for entering the message as it displays on the main screen or pole display.

Display on Pole — Causes the message to display on a pole display, if one is attached to the FOH terminal. The main screen messages continue to display on the order entry terminal, as before.

Other important points to consider when formulating a main screen message are as follows:

1. Only eight lines are available for message text.
2. Each line is limited to 20 characters.
3. If one of the Cool interfaces is being used, the message is limited to a total of 120 characters. The 120 characters can be arranged in any manner on the eight available lines.
4. The first and second messages are automatically displayed on the FOH terminal. If any other message must be displayed, that message must be set as an event. This results in the display of multiple messages. By default, message ID 01 displays on the left side of the main screen and message ID 02 displays on the right side.
5. When creating a message for pole display, leave a blank line between the lines of text so the message scrolls across the screen with a pausing effect. The message will be easier for the customer to view.

The Main Screen Message is always on display, but unlike some other messages in the system, it cannot be targeted to different areas of the restaurant or to different job codes.



Refer to Programmed


Events Types in Chapter 7, System Maintenance Functions, for more information about displaying messages on a pole display.

Guest Check

The Guest Check message feature permits customizing the information to be printed on the guest check and credit card vouchers. This feature enables the restaurant manager to communicate with the guest by printing messages on the guest check and by varying that message at different times and in different places in the restaurant. The first guest check message defined in the system becomes the default message if no preprogrammed events are active. You can manipulate guest check messages or make them active by scheduling them as specific preprogrammed events in Maintenance > System > Events. Messages activated by events override the default message. Select one or both of the following events:

- (16) Set Guest Check Message
- (31) Set Guest Check Footer Message by Terminal

Select Maintenance > Messages > Guest Check to display the Guest Check function tab:

 Refer to Programmed Event Types in Chapter 7, System Maintenance Functions, for information about programmed events and guest check messages.

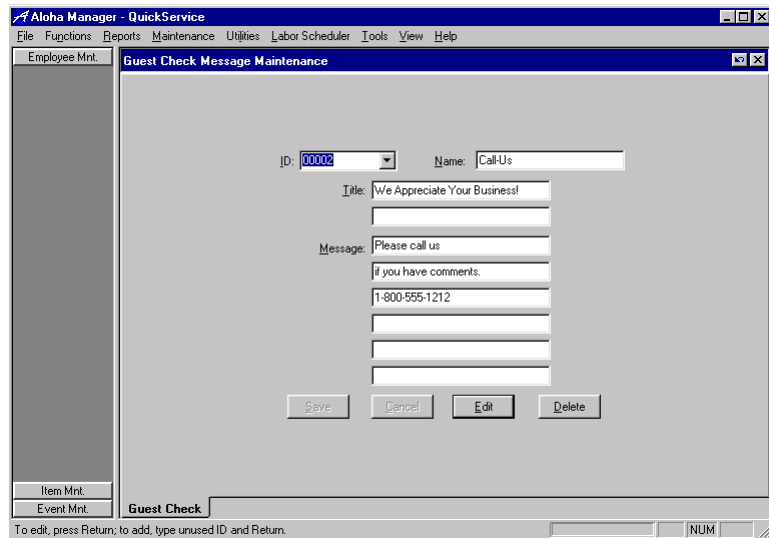


Figure 9-3 Guest Check Maintenance

ID — Holds a five-digit number that together with 'Name' uniquely identifies each record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record to edit and press Enter. The text entered in the 'Name' text box does not appear on the guest check.

Title — Holds text that is printed at the top of the guest check. Two lines are available, although it is not necessary to use both lines. The text in the 'Title' text boxes is printed on the guest check exactly as typed. If a centered appearance is desired, the message must be typed to appear centered.

Message — Holds text that is printed at the bottom of the guest check, and is used to communicate directly with the guest. It is used for sales messages and promotions, seasonal greetings, upcoming events, or any other desired message. The lines center automatically as the message prints on the guest check.

Clock In Information

The Clock In Information message feature allows the creation of special messages that target individual employees or specific job codes. These messages are displayed on order entry terminals when employees clock in. The messages do not print.

Select Maintenance > Messages > Clock In Information to display the Clock In Information function tab:

The screenshot shows the 'Aloha Manager - QuickService' application window. The 'Clock In Message Maintenance' tab is active. It features a sidebar with 'Employee Mnt.', 'Item Mnt.', and 'Event Mnt.' buttons. The main area contains a form with the following fields: 'ID:' with a dropdown menu showing '00001'; 'Employee:' with a dropdown menu showing '000 (None)'; and 'Job Code:' with a dropdown menu showing 'CASHIER (2)'. Below these is a 'Text:' section with four text input fields containing the messages: 'Remember!', 'Smile!', 'Be Courteous!', and 'Make the Customer Happy!'. At the bottom of the form are four buttons: 'Save', 'Cancel', 'Edit', and 'Delete'. A status bar at the very bottom reads 'To edit, press Return; to add, type unused ID and Return.' and includes a 'NUM' indicator.

Figure 9-4 Clock In Messages Maintenance

ID — Holds a five-digit number that uniquely identifies each record. To create a new record, enter an unused ID and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record to edit and press Enter.

Employee — Used to select an individual employee as the target of the message. If an individual employee is selected from the list, the message displays on the order entry terminal when the person clocks in. If the message is to be directed to more than one employee, select None.

Job Code — Used to select a job code as the target of the message. If a job code is selected from the list, the message displays on the order entry terminal when an employee who is assigned to that job code clocks in.

If the message is to be directed to all employees, select None in the Employee and Job Code drop-down lists.

Text — Holds the message that displays on the order entry terminal as employees clock in. Each line accepts up to 30 characters. The message displays exactly as it is typed, with no changeable formatting.

Utilities

This chapter discusses the Aloha POS features that deal with data verification, controlling the Front-of-House, database upgrade, handling data, and the End-of-Day functions.

Refresh Data.....	10-5
Preferences	10-7
Verify Data	10-9
View Debugging File.....	10-11
Create Diagnostic Files.....	10-13
Start/Stop Front-of-House.....	10-15
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Chapter 10

Aloha®

The Utilities menu is used to launch Aloha foreground and background programs essential to normal daily business activities.

Select Utilities from the menu bar. The Utilities Main Menu displays, as shown in Figure 10-1:

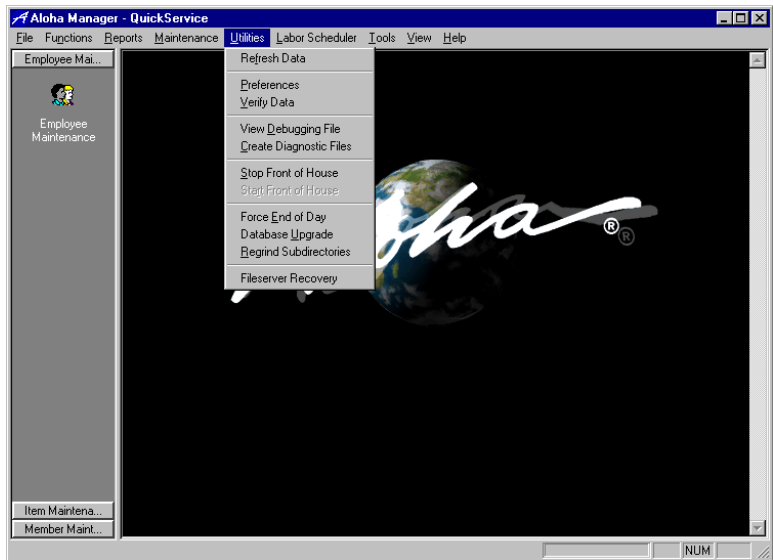


Figure 10-1 Utilities Main Menu

Programs that run in the foreground, such as End-of-Day and Refresh Data, take control of the system and temporarily close down FOH order entry terminals. Conversely, background processes run without affecting FOH operations, and are transparent to the user.

The daily activities on FOH order entry terminals, such as sales, cash receipts, cash disbursements, and the recording of labor activities, normally generate and collect raw data. Most of the activities provided in the Utilities menu involve organizing that raw data into usable form. Collecting and organizing data is a key concept in the operation of Aloha QuickService, and thus the programs launched from the Utilities menu are essential to the management of restaurant operations.

In this chapter you learn how to:

- Make database changes, such as price or menu changes, take effect in the FOH.
- Set sort preferences for database files alphabetically or by ID number.
- Check the database for errors that could stop the FOH from operating.
- View debugging files, which contain information about problems and errors.
- Create diagnostic files containing additional information about problems and errors.
- Start and stop the FOH.
- Force the EOD process to take place.
- Perform a database upgrade.

Refresh Data

This feature is used to forcibly update the database and configuration files that have been modified. System changes do not normally take effect until the End-of-Day (EOD). The normal EOD process handles data updates automatically and safely, and is the best course of action in most cases. In some cases, however, it may be necessary to update the database files in the middle of the day. When necessary, use the Refresh Data feature only between meal periods.

Select Refresh Data from the Utilities menu to replace the current data files. A warning is received before Refresh Data executes, as shown in Figure 10-2:

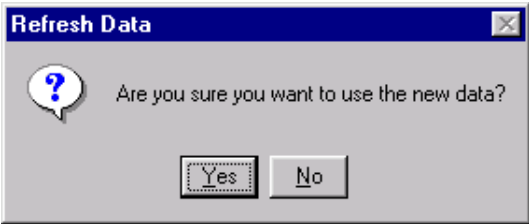


Figure 10-2 Refresh Data Confirmation

Click OK. Refresh Data copies the database and configuration files from the \NEWDATA subdirectory to the \DATA subdirectory. This process stops the FOH during the procedure, but the transaction log is not affected. After refreshing the data, the FOH restarts automatically, using the information in the updated files.



Refresh Data should be run only after running Verify Data from the Utilities menu. Correct all problems and errors revealed by Verify Data before resuming operations.

Run Refresh Data only when minor changes have been made to the data. Never run Refresh Data while the system is in use if substantial changes have been made in the data files. For example, if employees or menu items have been added, unpredictable behavior in the FOH may result if Refresh Data is selected while the system is in use. If employees or menu items have been deleted, the system may be incapable of running.

Preferences

This feature allows you to change the sort order of records in the Items, Menus, Modifiers, Exception Modifiers, Submenus, and Employees files. Records can be sorted alphabetically or by ID number, according to need. This feature is very helpful when performing maintenance on large database files. It is not necessary to run Verify or Refresh Data when changing the sort order of a file.

Select Utilities > Preferences to display the Preferences function tab, as shown in Figure 10-3:

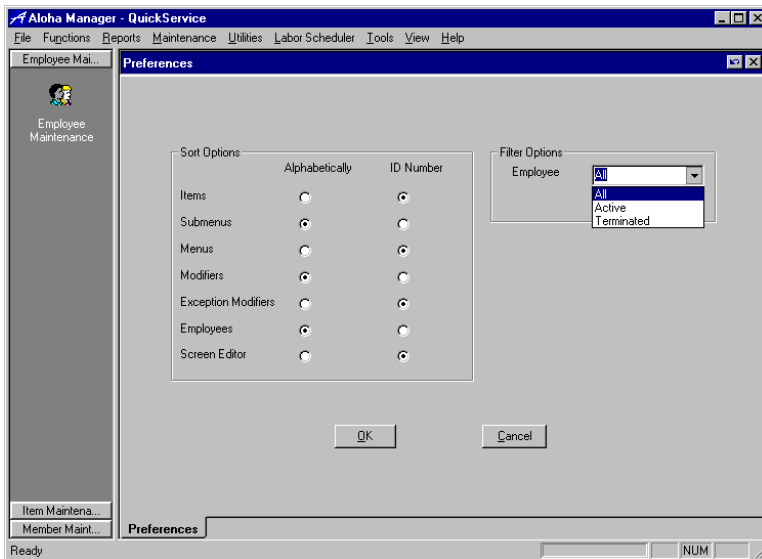


Figure 10-3 Preferences

Each file is listed in the Sort Options inset, and three methods of filtering the employee file are available on a drop-down list in the Filter Options inset. Select the desired options in these two insets, then click OK to save the change. The next time the file is accessed, the information will be sorted and filtered according to the selected method.

Sort Options Inset

This inset contains a list of items that can be sorted alphabetically or by ID number. The items are arranged in a column, and the sort options are arranged in two columns. Select the desired sort method for each item.

Filter Options Inset

This inset contains a drop-down list from which you can select a method for selecting employees for listing.

Employee — Select All, Active, or Terminated from the drop-down list.

Verify Data

Verify Data is used to initiate a processing routine that tests the validity of the data, and modifications to the files. When complete, this routine creates a text file named VERIFY.TXT in the \ALOHAQS\TMP subdirectory on the file server. The system automatically opens VERIFY.TXT using Windows Notepad.

Select Utilities > Verify Data to open VERIFY.TXT, as shown in Figure 10-4:

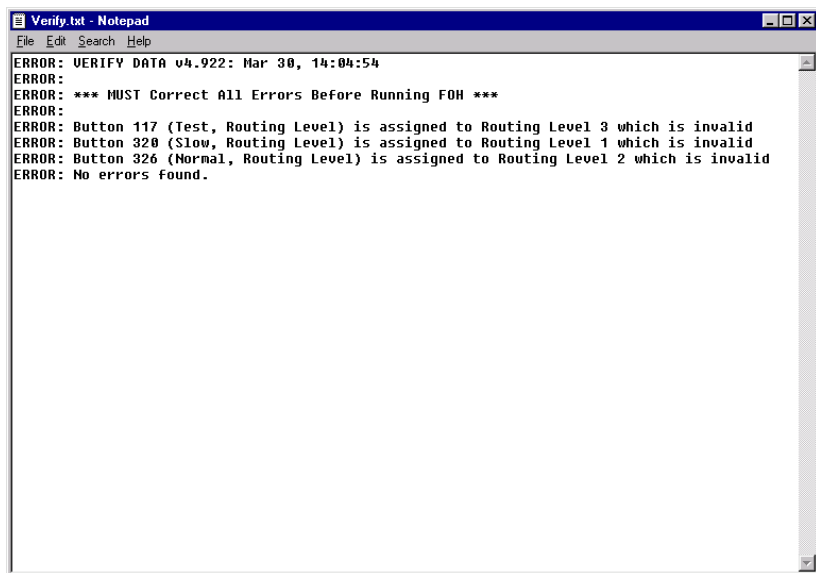


Figure 10-4 Verify Text

The file can also be viewed at other times using Windows Notepad or other Windows word processing programs. If the file is too large for Notepad, an error message displays asking if you want to open the file using Windows WordPad. Permit Windows to open the file with WordPad, but do not convert the file to another format when closing it.

The file itself contains a report of all errors, omissions, and data integrity problems in the database files. The errors listed can range in severity from minor data integrity errors that result in unexpected results, to fatal errors that can cause the system to halt.

One of the most common errors exposed in Verify Data is that an item number is not in a sales or retail category. This error, if not corrected, might lead to inaccurate sales reporting. Another typical data integrity error is when an item has no tax ID. Correcting all data integrity errors helps to ensure that no fatal errors occur.

Run Verify Data each time modifications are made to the database files, and before running Refresh Data as part of the End-of-Day routine or manually.

Perform the following steps for the most reliable results:

1. Make changes to the database files as required.
2. Run Verify Data. VERIFY.TXT opens using Notepad.
3. Print VERIFY.TXT from Notepad.
4. Correct any errors, as listed in VERIFY.TXT, to the database files.
5. Run Verify Data again.

Repeat this process until Verify Data produces a VERIFY.TXT file that does not contain errors.

Once the data is successfully verified and no errors remain in VERIFY.TXT, two procedures are available to make the new data available to the FOH:

- Allow the End-of-Day process to automatically update the files. This method is strongly recommended for safety of data and for the minimum amount of disruption in the day's business.
- Select Utilities > Refresh Data from the menu bar to immediately send all modifications, additions, and deletions to the FOH.

It is important to note that the second process stops the FOH before updating the data, then reboots all FOH terminals when the update process is complete.

View Debugging File

View Debugging File is used to view files containing information about errors or unusual conditions experienced while running or attempting to run the Aloha system. All debugging files are plain text files containing system-generated messages detailing errors experienced by the Aloha system during operation. If parts of the system are not set up properly and an attempt is made to run the software, the system stores information about the subsequent error conditions in one of these files. The base name of debugging files is 'Debout'. There are several types of files, each one containing messages and information generated by the system as the Aloha system operates. Each file type, designated by a specific file extension, contains information about a specific part of system operation, categorized by the file name extension.

Select Utilities > View Debugging File to display the View Debugging File function tab, as shown in Figure 10-5:

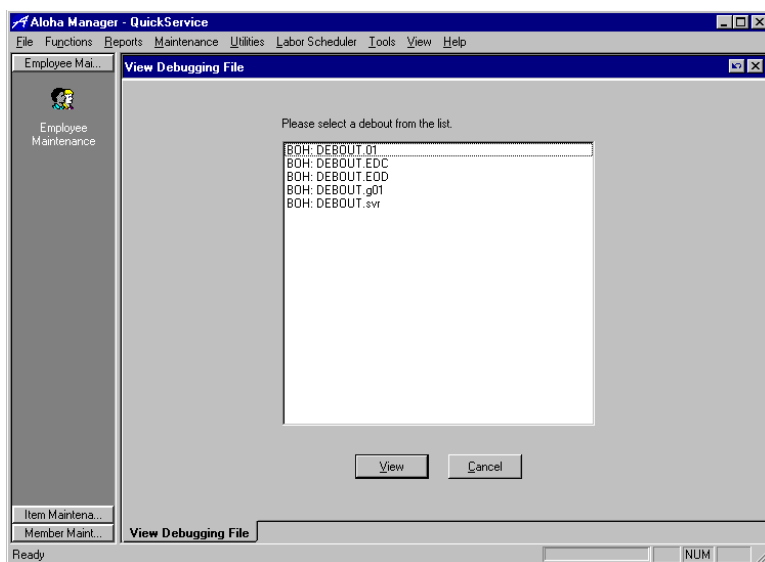


Figure 10-5 View Debugging File

Select the desired file from the list box and click View to display the contents of the file in Notepad, or click Cancel to close the function tab.

Debout files display in Windows Notepad when selected for viewing. Information in these files is entered from the top to the bottom, with the most recent information at the bottom. Press Ctrl+End to move immediately to the end of a file. An example of the entries at the bottom of a debout file is shown in Figure 10-6:

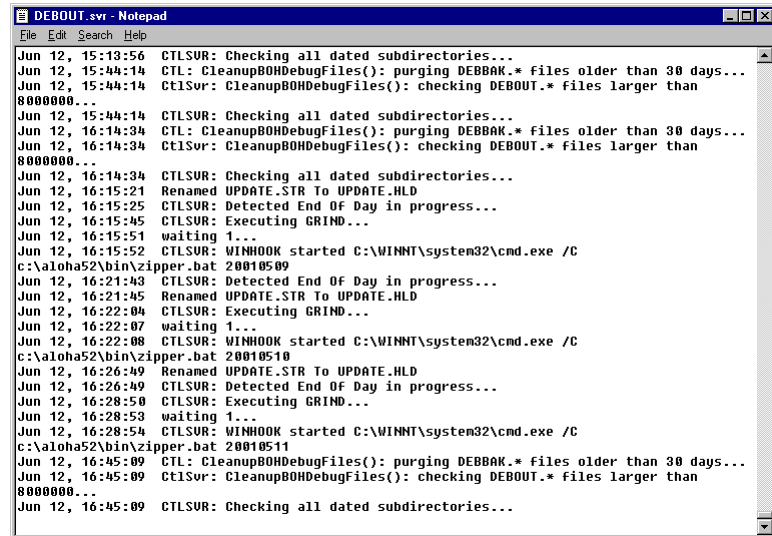


Figure 10-6 Example Debout File

At the start of each line entry, the system inserts the date and time the entry was created to make analysis of the file easier.



To track each time a mag stripe was used, set the variable DEBUGMSR in Aloha.ini to TRUE. The entry for each swipe appears in the debout for the terminal.

Create Diagnostic Files

During normal operation of the Aloha system, the program interacts with the operating system to create debug files, and to make entries in those files to record events as they happen in the system. These files are seldom needed, so the information recorded in them is periodically replaced. However, when problems occur, the information in these files may be invaluable in identifying the causes. Occasionally, it is necessary to obtain more information than the set of files normally available through the View Debugging File feature.

When more information is needed, the Create Diagnostic Files feature is invaluable in diagnosing problems experienced in the system. Select Utilities > Create Diagnostic Files to display the Create Diagnostic Files function tab, as shown in Figure 10-7:

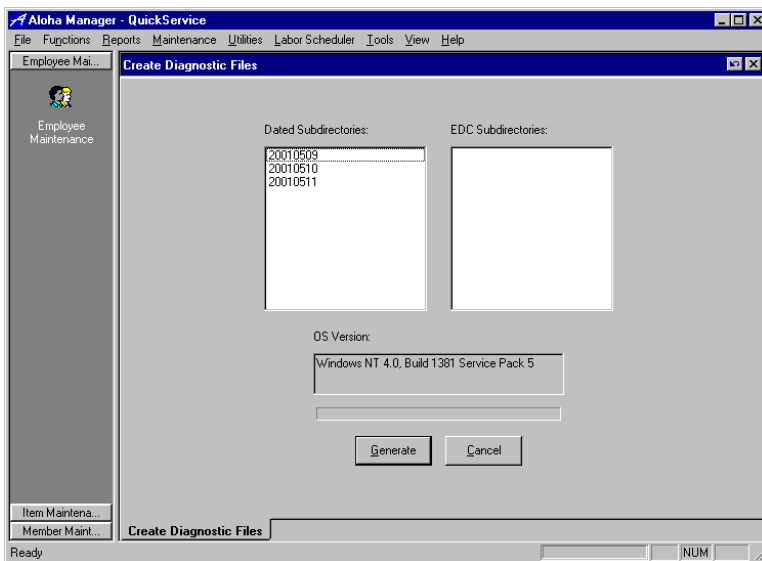


Figure 10-7 Create Diagnostic Files

This function tab provides information about data that is available for conversion to diagnostic files, and the operating system of the host computer.

Dated Subdirectories — Lists all dated subdirectories available for use in generating diagnostic files.

EDC Subdirectories — Lists all subdirectories on the system relevant to EDC functions, if you are using EDC on the host system.

OS Version — Displays the operating system name, type, and revision level.

Generate Button

Click Generate to create diagnostic files. Select all relevant items available in the list boxes to generate files containing information about those items. When you click Generate, the inset above the buttons displays as a progress bar. This process can take several minutes, depending upon the size of the database.

Cancel Button

Click Cancel to discard any selections made and to close the Create Diagnostic Files function tab.

After the diagnostic files have been created, return to View Debugging File. You will notice several additional debug files available for view and analysis. However, the true function of the Create Diagnostic Files feature is to create a new subdirectory named DIAG, directly beneath the \ALPHA directory. The new DIAG directory contains the following:

- Compressed copies of all dated subdirectories selected during the diagnostic file creation process.
- A compressed copy of the \ALPHA\DATA directory.
- A compressed file containing information about the configuration of the EDC program.
- A compressed file containing the contents of the \ALPHA\TMP directory at the time of diagnostic file creation.
- Text files containing information about the computer, the environment defined in the computer, and the Aloha program.

This information is used to capture the state of a system immediately after experiencing difficulties for easy diagnosis and correction.

Start/Stop Front-of-House

Start Front-of-House and Stop Front-of-House are used to manually start up or shut down the FOH order entry terminals. These selections are typically used during maintenance or troubleshooting activities.

Stop Front-of-House — Shuts down the FOH manually. This selection is unavailable after FOH has been stopped. The system displays a message asking if you are sure you want to stop the Front-of-House, as shown in Figure 10-8:

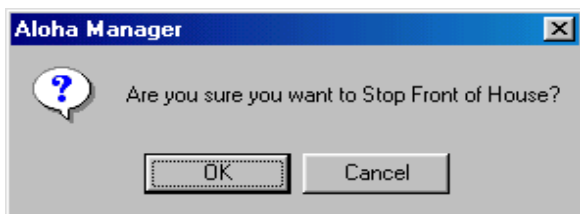


Figure 10-8 Stop FOH Confirmation

Click OK to stop the FOH. The system displays a message informing you that the FOH has been stopped, as shown in Figure 10-9:



Figure 10-9 FOH Stopped Confirmation

Start Front-of-House — Starts the FOH manually. This selection is unavailable while the FOH is active in the system or while the FOH is actually run-

ning. The system displays a message asking if you want to start the Front-of-House, as shown in Figure 10-10:

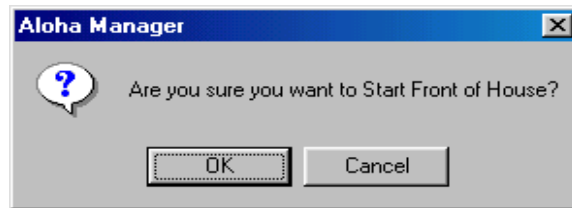


Figure 10-10 Start FOH Confirmation

Click OK to start the FOH. The system displays a message informing you the FOH has been started, as shown in Figure 10-11:



Figure 10-11 FOH Started Confirmation

The FOH terminals may require rebooting at this point.

The Stop Front-of-House command places a STOP marker file in the \ALO-HAQS\TMP subdirectory. The Start Front-of-House command removes the STOP marker file. If the FOH fails to start, determine if the Start Front-of-House command is available on the Utilities menu, and if it is, select it to restore the system to operation.



The STOP file itself has no useful contents. Starting and stopping the FOH depends on the absence or presence of this file.

Force End-of-Day

The End-of-Day (EOD) process is a foreground procedure that closes out the day's business activity and resets the system for business activity on the new day. Typically, the EOD routine is scheduled to occur at a specified time each day, usually late at night after the restaurant has closed.

When allowed to run at the scheduled time, the EOD procedure is activated by and run on the master terminal. For this reason, the master terminal must be running for EOD to begin processing. All activities, such as closing checks and clocking out, should be completed prior to the EOD process.

At the specified time, the EOD procedure stops the FOH on all other order entry terminals on the network, closes open sales to cash, clocks out any remaining employees, and begins the EOD routine.

The EOD events, in their order of execution, are:

1. An EOD indicator file is created in the \DATA subdirectory of the ALOHAQS directory tree. This stops all order entry terminal activity except the master terminal.
2. All open sales are closed to cash, and remaining employees are clocked out.
3. A subdirectory named in the format \YYYYMMDD for the current date of business is created in the \ALOHAQS directory tree.
4. The transaction log and all system configuration files for the current day are copied from the \DATA subdirectory to the newly created dated subdirectory. If the copy is successful, the log files (*.LOG) are deleted from the \DATA subdirectory.
5. The current Date-of-Business is updated with the new Date-of-Business. The Date-of-Business displays in the System group located in Maintenance > Store Settings.
6. Database and configuration files in the \NEWDATA subdirectory are copied over the existing database and configuration files in the \DATA subdirectory. This updates the files with any additions and modifications made during the day.
7. If the process is successful, the system places a file named DONE30 in the dated subdirectory, signifying the EOD procedure completed successfully.

8. The EOD indicator file in the \DATA subdirectory is deleted, thus permitting the order entry terminals on the network to restart.

If the '24-Hour Operation' check box is active, steps are omitted from the EOD process, thus shortening it. For example, all open sales remain open and carry over to the new business day. Employees working when the EOD occurs are clocked out and clocked back in by the system, but they are not checked out. This process allows 24-hour restaurants to continue business without interruption, although the Front-of-House is temporarily suspended for approximately one minute.



The '24-Hour Operation' check box is on the End-of-Day subtab located in Maintenance > Store Settings > System group.

Force End-of-Day is normally selected only after encountering a problem in the normal EOD process. Although not recommended, the EOD may be run at any unscheduled time, either with the Force End-of-Day selection from the Utilities menu or from the manager screen on order entry terminals. Since the Date-of-Business increments each time EOD is activated, it is not wise to run the EOD process more than once each day. Except in special circumstances at the request of the Aloha dealer or technical support representative, it is strongly suggested that EOD be permitted to run automatically as scheduled.

Select Utilities > Force End of Day to run the EOD procedure. The system displays a message asking if you are certain you want to run Force End-of-Day, as shown in Figure 10-12:

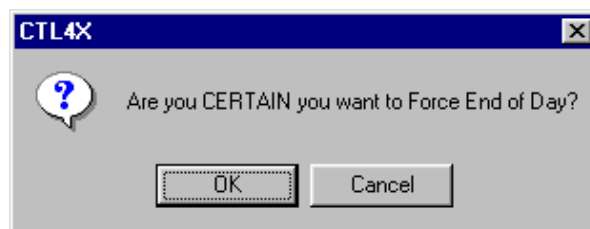


Figure 10-12 Force End of Day

The EOD procedure normally takes no longer than a few minutes to complete. If it takes longer, and terminals display 'Waiting For End-of-Day To Complete' for an extended period of time, read the debugging file first for information as to why the process may have stopped.

Database Upgrade

This feature enables the user to upgrade the restaurant database. When the restaurant makes numerous, major changes to the database, or if a corporate office wants to send a new database to each of its restaurants, this feature makes it easy to replace the old database with the new one.

Select Utilities > Database Upgrade to display the Database Upgrade dialog box, shown in Figure 10-13:

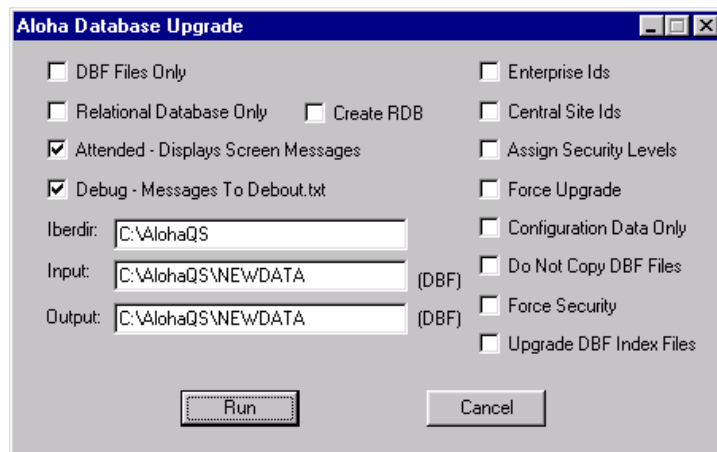


Figure 10-13 Database Upgrade

DBF Files Only — Upgrades the database files only.

Relational Database Only — Upgrades the relational database files only.

Create RDB — Creates the relational database during the upgrade.

Attended - Displays Screen Messages — Displays progress messages on the screen as the upgrade proceeds.

Debug - Messages to Debout.txt — Sends progress messages to the DEBOUT.TXT file.

Iberdir — Designates the path to the directory containing the Aloha program. Enter the complete path to the directory, including the drive letter.

Input — Designates the path to the directory containing the new database files to be used in the upgrade. Enter the complete path to the directory, including the drive letter.

Output — Designates the path to the directory into which the new database files are to be installed. Enter the complete path to the directory, including the drive letter.

Enterprise IDs — Creates Enterprise IDs for individual sites during the database upgrade. This selection would be appropriate for creating an Enterprise ID for an individual restaurant.

Central Site IDs — Creates Enterprise IDs for central sites during the database upgrade. This selection would be appropriate for creating an Enterprise ID for a facility serving as a central site for a group of restaurants.

Assign Security Levels — Assigns security levels to employees during the database upgrade.

Force Upgrade — Bypasses version checking during the database upgrade.

Configuration Data Only — Upgrades the configuration data only, not the historical data. This function applies to systems using relational database.

Do Not Copy DBF Files — Performs the upgrade without copying identical database files.

Force Security — Forces security conversion to proceed, even if data errors occur.

Upgrade DBF Index Files — Upgrades only the .CDX (index) files.

Every selection is active and selectable independently except for Upgrade DBF Index Files. All other selections become unavailable and are cleared when Upgrade DBF Index Files is selected. The only exceptions are the two Messages selections. The text boxes containing information about directory locations also remain unaffected.

Grind Status

The Grind Status function is available when you are using the SuperSite add-on or a relational database (RDB). Information provided in this section applies only to installations using RDB. The Aloha system supports both SQL Server and Access. If you are using the SuperSite, please consult the user manual for more information.

Regrind Subdirectories

The Regrind Subdirectories function enables you to regrind dated subdirectories. You can also schedule this function to run within a time frame. The Regrind function makes a request to the Grind Manager program to gather all dated subdirectories, gathers them together in a list, and returns this list to the Regrind function.

Select Utilities > Regrind Subdirectories. The Regrind Subdirectories function tab displays, as shown in Figure 10-14:

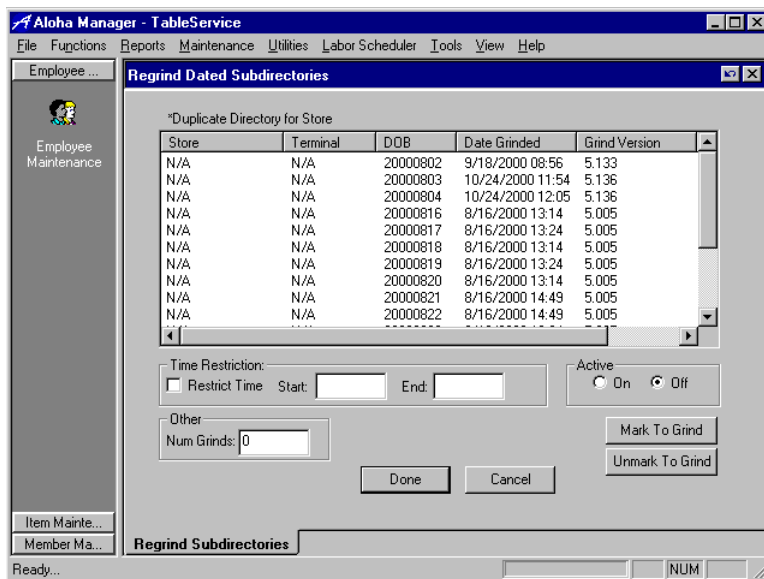


Figure 10-14 Regrind Subdirectories Function Tab

The store name and terminal number column displays 'NA' in a non-Super-Site environment. The DOB column displays the date-of-business for the dated subdirectory found on the file server. The Date Grinded column displays when the grind of the subdirectory occurred. The Grind Version column displays the version of the Grind program when it was last grinded; however, the version does not affect regrinding of dated subdirectories if you use a newer Grind version. The Status column states 'Marked' when you select a subdirectory for regrinding.

Time Restriction restricts the time the Regrind function runs. The Active On/Off option determines if the Regrind function is running in the Grind Manager program. If 'Active' is turned off, the Regrind function does not run. Changes made to Time Restriction and Num Grinds do not take place until you restart Grind Manager.

The Aloha system uses a '3 and Out' rule for regrinding. If a subdirectory encounters more than three errors, the regrind stops with the existence of the NOREGRIND file in the dated subdirectory. The subdirectory displays a status of 'NoRegrind'. When you mark the subdirectory to regrind, the Regrind program removes the NOREGRIND file from the subdirectory and attempts another regrind.

To regrind a dated subdirectory:

1. Select the **dated subdirectory**. You can select more than one dated subdirectory.
2. Click **Active**.
3. Click **Mark to Grind**. 'Marked' is placed in the 'Status' text box for the selected dated subdirectory.

If you do not want to regrind a particular subdirectory, click **Unmark to Regrind**. You may do this if the regrinding is a timed event.

4. Select **Restrict Time** to place a time frame to regrind the subdirectories, if necessary. If you do not select this check box all the dated subdirectories marked to regrind, will regrind as soon as you launch the function.
5. Enter the **Start** and **End** times using a 24-hour clock if you select Restrict Time. This determines the time frame for the regrind process to run. If a dated subdirectory is regrinding when the End-of-Day occurs, the regrind process continues until it is complete.
6. Set the **number of grinds** in the 'Num Grinds' text box to determine the number of dated subdirectories to regrind at any one time. For non-SuperSite locations, set 'Num Grinds' to one.
7. Click **Done**. A confirmation message displays.
8. Click **OK** to regrind and exit the Regrind Subdirectories function.

Settings for the Regrind function are stored in the SQL.INI file under the Regrind section. The settings include:

RESTRICTTIME=TRUE

STARTTIME=2300

ENDTIME=0600

ACTIVE=TRUE

NUMREGRINDERS=1

Fileserver Recovery

The Fileserver Recovery option is part of the Aloha system's redundancy function. The BOH computer normally serves as the file server. If an interruption in power occurs, the system returns to operation in redundant mode. The file server and the FOH terminals restart normally when power is restored, but one of the FOH terminals assumes the function of the file server. When you select the Fileserver Recovery option, the BOH computer locates the FOH computer that has been performing as the file server, copies the new file information, and directs all FOH computers to use the BOH computer as the file server again.

Aloha Glossary

BOGO (Buy One Get One) — A type of promotion in which the customer purchases one item at the regular price and receives another of the same item free

BOH (Back-of-House) — The file server from which Aloha Manager is launched. This file server also stores the dated subdirectories created during the EOD process.

Checkout — Checkout is a process that generates a printed listing of sales, payments, comps, promos, cash due, and so on, for a specific employee. A checkout is performed at the end of the employee's shift in preparation for turning in money due the restaurant prior to the employee clocking out. This is only required of employees who handle money.

Chit — A printed version of the customer's order. It prints or displays on remote printers or remote display systems, which are typically located in the bar and/or kitchen area. This aids the kitchen personnel and bartender in preparation of the order.

Clockout chit — A printed receipt showing the date and time an employee clocked out, and the employee's name, job code, and unpaid break times.

Comps — A method in which items on a guest check are discounted (given away as complimentary) by a dollar amount or a percentage. Typically used for frequent diner incentives, employee meals, or to appease an upset customer.



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Cool interface — One of three color themes available for the FOH (Front-of-House), including: Marble, Fabric, Blue Stone, and Wave. These are in addition to the default interface.

CounterService — Aloha QuickService flag setting which limits the end-user to two FOH terminals and three remote printers or remote display systems. All other functionality is the same. Allows the Aloha POS system to be cost effective and cost competitive for smaller venues (Mom & Pop shops).

DATA subdirectory — The \DATA subdirectory contains the working data for the FOH terminals of the restaurant, and is a subdirectory of the \ALOHA directory.

Dated subdirectory — The directory or file folder created by the EOD (End of Day) process that contains all of the sales data and all other data for that DOB (Date of Business). These dated subdirectories are stored on the BOH file server.

Day Parts — Day Parts are defined to divide the day into parts for reporting purposes, such as Breakfast, Lunch, Dinner, Happy Hour, and so on. The Event Scheduler triggers period changes using only a start time, with the subsequent period start time serving as the end time for the previous period.

DBF — Database files. These files have a .DBF extension.

Debout (Debugging Output) files — Debugging output files are created by and used by the Aloha POS system for system troubleshooting. A separate debout file is created for each terminal on the network including the BOH file server. Debouts are also created for the EOD (End-of-Day) process, EDC (Electronic Draft Capture) for credit card processing, the grind process, and so on.

DOB — Date-of-Business.

DONE30 — Marker file created by the EOD (End-of-Day) process to indicate the EOD completed successfully.

EDC (Electronic Draft Capture) — EDC is the technology used in the processing of credit card, debit card, or gift card transactions as payment for goods and/or services.

EGI (Enhanced Graphic Interface) — EGI enables you to use gradient, shadowing, and texture enhancements on the buttons on the FOH. If the computer running the interface has High Color (16 bits or greater), and has 64 MB of RAM or greater, the feature is automatically enabled. If the system does not meet these requirements, the regular default screen appears.

Environment variables — Environment variables are strings consisting of environment information, such as a drive, path, or file name, associated with a symbolic name that can be used by operating systems, including: Windows95, Windows98, and WindowsNT. The defined environment variables are read and set by the system when it boots up. (Examples: path to the Aloha POS software, number of terminals on network, whether the terminal is capable of serving as master terminal or server.)

EOD (End-of-Day) — The EOD (End-of-Day) process is a simple procedure that closes out the sales for a given DOB (Date-of-Business) and starts the new DOB with a fresh TRANS.LOG (transaction log) file and fresh PRT#.LOG (printer log) files. The EOD process is typically scheduled to occur as an automatic process every day at a certain time during a non-peak period; however, the EOD may be run manually from either the FOH (Front-of-House) or BOH (Back-of-House).

Event — Many common restaurant procedures for standard operations can be automated using the Event Scheduler. The Event Scheduler can be configured to automatically activate menus, reroute printers, change meal periods, change order entry modes, automate the EOD process, or any other activity that has an Active option switch as part of the database file record.

File server — The file server is the BOH computer which launches the Aloha Manager program.

FOH (Front-of-House) — FOH is the interface accessed by servers, bartenders, managers, cashiers, and other restaurant personnel to clock in/out, ring transactions, close checks, perform checkouts, and so on. FOH also refers to the hardware used at the FOH workstations.

GNDDBF30.XXX — Marker file created by CTL (Control) to indicate that the grind process for a given DOB completed successfully.

Grind — The grinder (GRIND.EXE) is a BOH executable program which reads the TRANS.LOG (transaction log) for a given DOB and creates a series of DBF files which contain all relevant information for that DOB. This program insulates other system components from the need to understand the encrypted, proprietary transaction log. The grinder is typically invoked automatically by the Control program approximately 30 seconds following a successfully completed EOD process. If the grinder is successful, it creates a marker file, GNDDBF30.XXX, and places it in the dated subdirectory created during the EOD process.

House accounts — The House Account feature is available for use as an accounts receivable module within the Aloha POS system, when combined with a correctly defined house account tender.

Iber (IBER.EXE or IBERQS.EXE) — -IBER.EXE and IBERQS.EXE are the executable program files that launch the FOH interface for TableService and QuickService, respectively.

IBERCFG.BAT — IBERCFG.BAT is a batch file which contains all of the Aloha POS environment variables. Ibertech recommends calling this batch file from within the AUTOEXEC.BAT batch file so that the environment variables are read and set when the system boots up.

Item Lookup — The Item Lookup function allows the price of an item to be located using its name or SKU (Stock Keeping Unit) number as defined in Item maintenance. The Item Lookup function was created to be used in a retail environment; however, it is not necessarily limited to retail items only.

Mag Card Reader or Mag Stripe Reader — A Mag Card Reader is a device that reads and interprets the magnetic stripe encoded on a credit card, debit card, Smart Card, or other card used by an employee to log on to the Aloha POS system.

Master terminal — The master terminal acts as a sort of arbitrator among the terminals on the network, and manages some important network communication tasks. The master terminal is responsible for running the EOD process.

Mastercapable — Mastercapable is an environment variable which stipulates whether a terminal is capable of taking over as the master terminal in the event that the true master terminal is down or cannot be located by other terminals on the network.

NEWDATA Directory — The NEWDATA directory is the subdirectory of the \ALPHA directory which contains data that has been changed or modified (in the Maintenance module), but is not currently being used by the FOH at the restaurant.

Order Time — Order time is the time at which items are ‘sent to the kitchen’. When using the Advance Orders feature, the system uses the following calculation: $\text{Serve Time} - \text{Prep Time} = \text{Order Time}$.

Ordered Items — Ordered items are items that are ‘sent to the kitchen’. The text displays as black in the guest check window and you must perform a void to remove them from the check.

PLU (Price Look Up) — The PLU (Price Look Up) function allows the price of an item to be located using its PLU number as defined in Item maintenance.

PMS (Property Management System) — The industry standard interface for hotels to manage the various functions of a hotel. The Aloha POS system interfaces with the following PMS systems: Generic Micros 4700, Encore, RDP, Springer Miller, HIS, CSS, and Fidelio.

POS — Point-of-Sale

Prep Time — Indicates the time required to prepare an order.

Printer groups — Printer groups allow individual printers to be combined into logical groups, once the individual printers have been defined in Maintenance. This allows routing of items to individual or multiple remote printers for chit printing. Printer groups can contain between zero and five individual printers, and are attached to the item at the item level in Item maintenance.

Printer logs — All printing for the current DOB is stored in printer log files called PRT#.LOG, with the # being a variable corresponding to the record ID for each printer as defined in Maintenance. These log files are located in the DATA subdirectory of \ALPHA, and function similarly to the TRANS.LOG, containing all printing that has been sent to a given printer on the current day, as well as indicators as to the data which has printed successfully.

Promos (Promotions) — Promotions allow special pricing specific to the promotion being offered. Promotions might be defined for discounts, specials, coupons, and combo meals; and might be seasonal or always available. Six predefined promotion types are offered: BOGO, Combo, Coupon, New Price, Check Reduction, and Quick Combo.

Punch — A punch refers to the clock in and out times of an employee, hence the term, ‘punching the clock’.

QuickService — Aloha QuickService is Ibertech’s product offering specifically designed for fast food restaurant environments.

Receipt printer — A receipt printer is a printer physically located in the customer area of a restaurant, and is used to print guest checks and credit card vouchers.

Redundancy — Redundancy architecture is designed to retain maximum system functionality in the event of common hardware failures. There are three types of failures: BOH file server down, master terminal down, and complete network failure (hub failure). Redundancy provides a system of fault tolerance that allows the restaurant to continue functioning regardless of the type of failure experienced.

Refresh — Refresh is a process which copies all system configuration files from the \NEWDATA subdirectory of \ALOHA to the \DATA subdirectory of \ALOHA. Changes made to the database are made within Maintenance (\NEWDATA directory). The changes do not take effect on the FOH until a refresh occurs (FOH reads the files in the \DATA directory).

Remote printer — A remote printer is a printer physically located in the bar or food preparation area of a restaurant, and is used to print kitchen chits.

Revenue center — Revenue centers are defined and used for reporting purposes. Typically, revenue centers correspond with the areas of the restaurant, such as: Dining Room, Bar, Patio, Cigar Lounge, Banquets, and Room Service (hotel).

Serve Time — Indicates the time the guest expects to receive or pick up their order.

Servercapable — Servercapable is an Aloha POS environment variable which stipulates whether a terminal is capable of taking over as the file server in the event that the true file server is down or cannot be located by other terminals on the network.

SKU — Stock Keeping Unit

Tender — Valid types of payment that a restaurant accepts as payment for goods and services. These include cash, credit cards, house accounts, and so on.

Time Slice — A time slice indicates an employee's shift using the basic labor scheduler program within Aloha Manager. The left end represents the clock in time and the right end represents the clock out time for the shift.

TRANS.LOG — The TRANS.LOG (transaction log) is a file stored in the \DATA subdirectory of \ALOHA. It contains all activity and transactions for the current DOB. The log stores all FOH activity that occurs during the current DOB in this secure, proprietary encrypted format. New data is appended to the log. It is impossible to lose checks with this system, since every change to the system is reflected in the log. The log also provides a natural audit trail for monitoring potential misuse of the system by employees.

Unordered Items — Unordered items are items that are entered but not 'sent to the kitchen'. The text displays as blue in the guest check window.

Winhook — The Winhook feature is used to launch a custom batch file following the EOD process. Custom batch files allow the automation of certain routines that are outside the system but address Aloha data files, such as compressing, or zipping, data files and copying them to another drive.

Networking Glossary

10Base2 — 10 Mbps Baseband Ethernet specification using RG-58 thinnet 50-ohm thin coaxial cable with BNC T Connector. (Limit 185 meters.)

10Base5 — 10 Mbps Baseband Ethernet specification using Thicknet DIX/AUI 50-ohm Baseband coaxial cable. (Limit 500 meters.)

10BaseF — 10 Mbps Baseband Ethernet specification for the 10BaseFB, 10BaseFL, and 10BaseFP standards for Ethernet over fiber-optic cabling.

10BaseFB — 10 Mbps Baseband Ethernet specification using fiber optic cabling. Provides a synchronous signaling backbone that allows additional segments and repeaters to be connected to the network. (Limit 2000 meters.)

10BaseFL — 10 Mbps Baseband Ethernet specification using fiber optic cabling. It is designed to replace the FOIRL specification. (Limit 2000 meters, 1000 meters w/FOIRL.)

10BaseFP — 10 Mbps Fiber-passive Baseband Ethernet specification fiber optic cabling. Used to organize computers into a star topology without the use of repeaters. (Limit 500 meters.)

10BaseT — A variant of Ethernet which allows stations to be attached via twisted pair cable. 10 Mbps Baseband Category 3, 4, or 5 UTP cable RJ-45. One pair for transmitting data and the other for receiving data. (Limit 100 meters.)

10Broad36 — 10 Mbps Broadband Ethernet specification using Broadband coaxial cable. (Limit 3600 meters.)



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100BaseFX — 100 Mbps Baseband Fast Ethernet specification using two strands of multimode fiber optic cabling per link. (Limit 400 meters).

100BaseT — 100 Mbps Baseband Fast Ethernet specification using Category 5 UTP cable RJ-45 connectors. The 100BaseT link pulses, which are sent when there is no traffic, contain more information than those used in 10BaseT.

100BaseT4 — 100 Mbps Baseband Fast Ethernet specification using four pairs of Category 3, 4, or 5 UTP wiring. (Limit 100 meters).

100BaseTX — 100 Mbps Baseband Fast Ethernet specification using two pairs of either UTP or STP wiring. The first pair is used to receive data; the second is used to transmit data. (Limit 100 meters).

100BaseX — 100 Mbps Baseband Fast Ethernet specification for the 100BaseFX and 100BaseTX standards for Fast Ethernet over fiber optic cabling.

100VG-AnyLAN — 100 Mbps Fast Ethernet and Token Ring media technology (developed by Hewlett-Packard). It uses four pairs of Category 3, 4 or 5 UTP cabling. This high speed technology can be made to operate on existing 10BaseT.

ANSI — American National Standards Institute. The United States government body responsible for approving US standards in many areas, including computers and communications. ANSI is a member of ISO. ANSI sells ANSI and ISO (international) standards.

APDU — Application Protocol Data. A packet of data exchanged between two application programs across a network. This is the highest level view of communication in the OSI seven layer model and a single packet exchanged at this level may actually be transmitted as several packets at a lower layer as well as having extra information (headers) added for routing, and so on.

ARP — Address Resolution Protocol. A method for finding a host's Ethernet address from its Internet address. The sender broadcasts an ARP packet containing the Internet address of another host and waits for it (or some other host) to send back its Ethernet address. Each host maintains a cache of address translations to reduce delay and loading. ARP allows the Internet address to be independent of the Ethernet address but it only works if all hosts support it.

ATM — Asynchronous transfer mode – fixed packets – Broadband. Speeds up to 622 Kbps – used mainly for ISP backbones because of cost. 53 byte cells instead of packets. – Packet switching protocol. A method for the dynamic allocation of bandwidth using a fixed-size packet (called a cell).

ATS — Asynchronous Terminal Server

ALOHA — A system of contention resolution devised at The University of Hawaii. Packets are broadcast when ready, the sender listens to see if they collide and if so retransmits after a random time. Slotted ALOHA constrains packets to start at the beginning of a time slot. Basic ALOHA is appropriate to long propagation time nets (such as, satellite). For shorter propagation times, carrier sense protocols are possible.

Address mask — A bit mask used to identify which bits in an IP address correspond to the network address and subnet portions of the address. This mask is often referred to as the subnet mask because the network portion of the address can be determined by the class inherent in an IP address. The address mask has ones in positions corresponding to the network and subnet numbers and zeros in the host number positions.

Aloha — A Hawaiian greeting. Also the world's best POS software.

Analog — A description of a continuously variable signal or a circuit or device designed to handle such signals. The opposite is **discrete** or **digital**. Analog circuits are much harder to design and analyze than digital ones because the designer must take into account effects such as the gain, linearity and power handling of components, the resistance, capacitance and inductance of PCB tracks, wires and connectors, interference between signals, power supply stability and more.

A digital circuit design, especially for high switching speeds, must also take these factors into account if it is to work reliably, but they are usually less critical because most digital components will function correctly within a range of parameters whereas such variations will corrupt the outputs of an analog circuit.

Application Layer — The top layer of the OSI seven layer model. This layer handles issues like network transparency, resource allocation and problem partitioning. The application layer is concerned with the user's view of the network (such as formatting electronic mail messages). The presentation layer provides the application layer with a familiar local representation of data independent of the format used on the network.

Asynchronous Transmission — Transmission in which time intervals between transmitted characters may be of unequal length. Transmission is controlled by start and stop bits. Data stream passed in one direction. Most common.

Attenuation — The degrading of a signal as it travels farther from its origination.

BDC — Backup Domain Controller. A computer that receives a copy of the domain's security policy and database and authenticates network logins. (It provides a backup in case the PDC becomes unavailable. It is not required but is recommended to be a backup to the PDC.)

Bandwidth — The amount of data that can be sent through a given communications circuit per second.

Baseband — A transmission medium through which digital signals are sent without frequency shifting. In general, only one communication channel is available at any given time. Ethernet is an example of a baseband network.

Binary — 1. Base two. A number representation consisting of zeros and ones used by practically all computers because of its ease of implementation using digital electronics and Boolean algebra. 2. Any file format for digital data encoded as a sequence of bits but not consisting of a sequence of printable characters (text). The term is often used for executable machine code. Of course all digital data, including characters, is actually binary data (unless it uses some (rare) system with more than two discrete levels) but the distinction between binary and text is well established.

Bit — (b) binary digit. The unit of information; the amount of information obtained by asking a yes-or-no question; a computational quantity that can take on one of two values, such as true and false or 0 and 1; the smallest unit of storage - sufficient to hold one bit. A bit is said to be set if its value is true or 1, and reset or clear if its value is false or 0. One speaks of setting and clearing bits. To toggle or invert a bit is to change it, either from 0 to 1 or from 1 to 0.

Bitwise — A bitwise operator treats its operands as a vector of bits rather than a single number. Boolean bitwise operators combine bit N of each operand using a Boolean function (NOT, AND, OR, XOR) to produce bit N of the result. For example, a bitwise AND operator (& in C) would evaluate 13 & 9 as (binary) 1101 & 1001 - 1001 - 9, whereas, the logical AND, (C &&) would evaluate 13 && 9 as TRUE && TRUE - TRUE - 1.

In some languages, such as Acorn's BASIC V, the same operators are used for both bitwise and logical operations. This usually works except when applying NOT to a value x which is neither 0 (false) nor -1 (true), in which case both x and (NOT x) will be nonzero and thus treated as TRUE. Other operations at the bit level, which are not normally described as 'bitwise,' include shift and rotate.

Boolean — The type of an expression with two possible values, **true** and **false**. Also, a variable of Boolean type or a function with Boolean arguments or result. The most common Boolean functions are AND, OR and NOT.

Bit mask — A pattern of binary values which is combined with some value using bitwise AND with the result that bits in the value in positions where the mask is zero are also set to zero.

Bridge — A device which forwards traffic between network segments based on data link layer information. These segments would have a common network layer address.

Broadband — A transmission medium capable of supporting a wide range of frequencies, typically from audio up to video frequencies. It can carry multiple signals by dividing the total capacity of the medium into multiple, independent bandwidth channels, where each channel operates only on a specific range of frequencies.

Broadcast — A transmission to multiple, unspecified recipients. On Ethernet, a broadcast packet is a special type of multicast packet which all nodes on the network are always willing to receive.

Broadcast storm — A broadcast on a network that causes multiple hosts to respond by broadcasting themselves, causing the storm to grow exponentially in severity.

Bus Topology — Bus consists of a single linear cable called a trunk. Data is sent to all computers on the trunk. Computers listen and accept only messaged addressed to them. Bus is a passive topology. Performance degrades as more computers are added to the bus. Signal bounce is eliminated by a terminator at each end of the bus. Barrel connectors can be used to lengthen cable. Repeaters can be used to regenerate signals.

Byte — A unit of information, often 1 character, made up of 8 bits.

CAT 1 — Voice only

CAT 2 — 4 Mbps

CAT 3 — 10 Mbps

CAT 4 — 16 Mbps

CAT 5 — 100 Mbps

CRC — Cyclic Redundancy Check or Cyclic Redundancy Code. A number derived from, and stored or transmitted with, a block of data in order to detect corruption. By recalculating the CRC and comparing it to the value originally transmitted, the receiver can detect some types of transmission errors.

CSMA/CD — Carrier Sense Multiple Access / Collision Detect. The low level network arbitration protocol used on Ethernet. Nodes wait for quiet on the net before starting to transmit and listen while they are transmitting. If two nodes transmit at once the data gets corrupted. The nodes detect this and continue to transmit for a certain length of time to ensure that all nodes detect the collision. The transmitting nodes then wait for a random time before attempting to transmit again thus minimizing the chance of another collision. The ability to detect collision during transmission reduces the amount of bandwidth wasted on collisions compared with simple Aloha broadcasting.

CSMA/CA — Collision Avoidance; Announces intention to send data (Appletalk).

CTS — Clear to Send

Checksum — A computed value that depends on the contents of a block of data and which is transmitted or stored along with the data in order to detect corruption of the data. The receiving system recomputes the checksum based upon the received data and compares this value with the one sent with the data. If the two values are the same, the receiver has some confidence that the data was received correctly. The checksum may be 8 bits (modulo 256 sum), 16, 32, or some other size. It is computed by summing the bytes or words of the data block ignoring overflow. The checksum may be negated so that the total of the data words plus the checksum is zero. Internet packets use a 32-bit checksum.

Circuit switching — A communications paradigm in which a dedicated communication path is established between the sender and receiver along which all packets travel. The telephone system is an example of a circuit switched network. Also called connection-oriented. Contrast connectionless, packet switching.

Collision — When two hosts transmit on a network at once causing their packets to collide and corrupt each other.

Collision detection — A class of methods for sharing a data transmission medium in which hosts transmit as soon as they have data to send and then check to see whether their transmission has suffered a collision with another host's. If a collision is detected then the data must be resent. The resending algorithm should try to minimize the chance that two hosts' data will repeatedly collide. For example, the CSMA/CD protocol used on Ethernet specifies that they should then wait for a random time before retransmitting.

Combination Networks — Combines the features of both peer-to-peer and Server based networks, Users can share resources among themselves as well as access server-based resources.

Connection — The data communication method in which communication occurs between hosts with no previous setup. Packets sent between two hosts may take different routes. UDP is a connectionless protocol. Also called packet switching. Contrast circuit switching, connection-oriented.

Connection-oriented — (Or connection-based, stream-oriented). A type of transport layer data communication service that allows a host to send data in a continuous stream to another host. The transport service will guarantee that all data will be delivered to the other end in the same order as sent and without duplication. Communication proceeds through three well-defined phases: connection establishment, data transfer, connection release. The most common example is Transmission Control Protocol (TCP).

Connectionless Protocol — The data communication method in which communication occurs between hosts with no previous setup. Packets sent between two hosts may take different routes. Also called packet switching. Contrast circuit switching, connection-oriented.

Constant mapping — Some TCP software constructs the destination Ethernet Address from the top 24 bits of the Ethernet address followed by the low 24 bits of the (class A) destination Internet address. For this scheme the top 24 bits of the Ethernet address must be the same on all hosts on the net. Contrast ARP.

Contention slot — (Or contention period). Minimum time a host must transmit for before it can be sure that no other host's packet has collided with its transmission. If the maximum propagation delay from one host to any other is T , then a host that starts to transmit at time t_0 may collide with a host that starts just before $t_0 + T$. The first host will not detect the collision until time $t_0 + 2T$.

Cross-over. See Null Modem.

Cross-pinning. See Null Modem.

Crosstalk — Signal overflow from one wire to another adjacent wire.

DB9 — The standard 9-pin D-shell connector used for RS-232 serial communication.

DB25 — The standard 25-pin D-shell connector used for RS-232 serial communication.

DCE — Data Communications Equipment

DHCP — Dynamic Host Configuration Protocol. A protocol that provides a means to dynamically allocate IP addresses to computers on a local area network. The system administrator assigns a range of IP addresses to DHCP and each client computer on the LAN has its TCP/IP software configured to request an IP address from the DHCP server. The request and grant process uses a lease concept with a controllable time period.

DNS — Domain Name Services - A general-purpose distributed, replicated, data query service chiefly used on Internet for translating hostnames into Internet addresses. Also, the style of hostname used on the Internet, though such a name is properly called a fully qualified domain name. DNS can be configured to use a sequence of name servers, based on the domains in the name being looked for, until a match is found.

DSR — Data Set Ready

DSU — Digital Service Unit

DTE — Data Terminal Equipment.

DTR — Data Terminal Ready

DVM — Digital VoltMeter) – Uses voltage, tests for continuity or short.

Datagram — A self-contained, independent entity of data carrying sufficient information to be routed from the source to the destination computer without reliance on earlier exchanges between this source and destination computer and the transporting network.

Data Link Layer — The third lowest layer in the OSI seven layer model. The network layer determines routing of packets of data from sender to receiver via the data link layer and is used by the transport layer. The most common network layer protocol is IP.

Deferral — Waiting for quiet on the Ethernet.

Digital — A description of data that is stored or transmitted as a sequence of discrete symbols from a finite set, most commonly this means binary data represented using electronic or electromagnetic signals. The opposite is analog.

Domain — On the Internet, ‘domain’ is most commonly used to refer to a group of computers whose hostnames share a common suffix, the domain name. The last component of this is the top-level domain.

Domain address — The name of a host on the Internet belonging to the hierarchy of Internet domains.

Dot notation — Berkeley UNIX notation for Internet addresses. An Internet address in dot notation consists of one to four numbers in hexadecimal (leading 0x), octal (leading 0) or decimal. It represents a 32-bit address. Each leading number represents eight bits of the address (high byte first) and the last number represents the rest. Such as address 0x25.32.0xab represents 0x252000ab. By far the most common form is four decimal numbers, such as 146.169.22.42. Many commands will accept an address in dot notation in place of a hostname.

Dynamic Router — Automatically track routes. Routers talk to routers and add them to the tables.

Dynamic Routing — Routing that adjusts automatically to network topology or traffic changes.

Ethernet — A local area network. IEEE 802.3, recognized as the industry standard. Data is broken into packets that are transmitted using the CSMA/CD algorithm until they arrive at the destination without colliding with any other. The first contention slot after a transmission is reserved for an acknowledge packet. A node is either transmitting or receiving at any instant. The bandwidth is about 10 Mbps.

Disk-Ethernet-Disk transfer rate with TCP/IP is typically 30 kilobyte per second. Version 2 specifies that collision detect of the transceiver must be activated during the inter-packet gap and that when transmission finishes the differential transmit lines are driven to 0V (half step). It also specifies some network management functions such as reporting collisions, retries and deferrals. Ethernet cables are classified as XbaseY, such as 10base5, where X is the data rate in Mbps, 'base' means baseband (as opposed to radio frequency) and Y is the category of cabling. The original cable was 10base5 (full-spec), others are 10Base2 (thinnet) and 10BaseT (twisted-pair) which is now very common. 100baseT (Fast Ethernet) is also increasingly common.

Ethernet Address — Or MAC address. The physical address identifying an individual Ethernet controller board. An Ethernet address is a 48-bit number aabbccddeeff where a-f are hexadecimal digits. The first 24 bits, aabbcc, identify the manufacturer of the controller. The Ethernet address is hard-wired on some controllers, stored in a ROM on some, and others allow it to be changed from software. It is usually written as six hexadecimal numbers, such as 08:00:20:03:72:DC.

FDDI — Fiber Distributed Data Interface. 100Mbps Used mainly for MAN technology - works in a double ring. Like Token-Ring, only many frames can go on the token, not just one.

FQDN — Fully Qualified Domain Name. The full name of a system, consisting of its local hostname and its domain name. For example, 'venera' is a hostname and 'venera.isi.edu' is Fully Qualified Domain Name. An FQDN should be sufficient to determine a unique Internet address for any host on the Internet.

The same naming scheme is also used for some hosts which are not on the Internet, but share the same name-space for electronic mail addressing. A host that does not have a FQDN (which is not 'domainist') must be addressed using a bang path. All Internet computers and most UUCP sites can now resolve FQDNs, thanks to a large amount of behind-the-scenes magic and PD software written since 1980 or so.

Fast Ethernet — A version of Ethernet developed in the 1990s that can carry 100 Mbps compared with standard Ethernet 10 Mbps. It requires upgraded network cards and hubs. The relevant standards are 100baseT, 100BaseFX and 100BaseVG.

Fiber Optic Cable — Cable constructed of pure glass using light beams to transmit large amounts of data. Resistant to interference. Speeds of between 100Mbps - 200,000Mbps.

File server — Hardware and software that together provide file-handling and storage functions for multiple users on a local area network. Storing files on a file server saves having multiple copies stored on individual computers, thus economizing on disk space and also makes administrating and updating the files easier.

Flow control — The collection of techniques used in serial communications to stop the sender sending data until the receiver can accept it. This may be either software flow control or hardware flow control. The receiver typically has a fixed size buffer into which received data is written as soon as it is received. When the amount of buffered data exceeds a 'high water mark,' the receiver will signal to the transmitter to stop transmitting until the process reading the data has read sufficient data from the buffer that it has reached its 'low water mark,' at which point the receiver signals to the transmitter to resume transmission.

Fragment — A piece of a packet. When a router is forwarding an IP packet to a network that has a maximum packet size smaller than the packet size, it is forced to break up that packet into multiple fragments. These fragments will be reassembled by the IP layer at the destination host.

Fragmentation — The IP process in which a packet is broken into smaller pieces, fragments, to fit the requirements of a physical network over which the packet must pass. The inverse is reassembly.

Frame Relay — Point-to-point system. Uses PVC; fast-packet, variable-length digital; digital leased lines. Provides bandwidth as needed. Packet-switching protocol.

Gateway — Works at all layers. Gateways change format of the data to make it conform to the application program at the receiving end. Strips packet and rebuilds with new protocol info, that is, PC connectivity to mainframe. Gateway strips PC packet and rebuilds it in mainframe form. Proxy server is gateway to the Internet.

Hexadecimal — Or ‘hex.’ Base 16. A number representation using the digits 0-9, with their usual meaning, plus the letters A-F (or a-f) to represent hexadecimal digits with values of (decimal) 10 to 15. The right-most digit counts ones, the next counts multiples of 16, then 16^2 - 256, and so on.

Hop — One direct host-to-host connection forming part of the route between two hosts in a routed network such as the Internet. Some protocols place an upper limit on the hop count in order to detect routing loops.

Host — A computer connected to a network. The term node includes devices such as routers and printers which would not normally be called hosts.

Host number — The host part of an Internet address. The rest is the network number.

Hostname — The unique name by which a computer is known on a network, used to identify it in electronic mail, Usenet news, or other forms of electronic information interchange.

HOSTS — File that contains mappings between DNS host names and their IP addresses.

IEEE — Institute of Electrical and Electronic Engineers. The world’s largest technical professional society, based in the USA. Founded in 1884 by a handful of practitioners of the new electrical engineering discipline, today’s Institute has more than 320,000 members who participate in its activities in 147 countries.

The IEEE sponsors technical conferences, symposia and local meetings worldwide, publishes nearly 25% of the world's technical papers in electrical, electronics and computer engineering and computer science, provides educational programs for its members and promotes standardization. Areas covered include aerospace, computers and communications, biomedical technology, electric power and consumer electronics. To learn more go to: <http://groups.ieee.org/groups/802/802info.html>.

IP — Internet Protocol. The network layer for the TCP/IP protocol suite widely used on Ethernet networks, defined in STD 5, RFC 791. IP is a connectionless, best-effort packet switching protocol. It provides packet routing, fragmentation and reassembly through the data link layer.

IP address — See **Internet Address**.

IPX/SPX — Novell. Similar to NetBEUI, only routable.

IRQ — Interrupt Request. The following is a list of common IRQ settings:

- 2 (9) EGA/VGA
- 3 Available (or COM2,COM4)
- 4 COM 1, COM 3
- 5 Available (unless LPT2 or sound card)
- 6 Floppy Disk Controller
- 7 Parallel port (LPT1)
- 8 Real-time clock
- 10 Available
- 11 Available
- 12 Mouse (PS/2)
- 13 Math Coprocessor
- 14 Hard-disk controller
- 15 Available

ISDN — Integrated services digital network; 128 bits per second - 2B+D - 2 64Kbps B channels & 1 16Kbps D channel. Voice, data, images; signaling and link management.

ISO — A voluntary, nontreaty organization founded in 1946, responsible for creating international standards in many areas, including computers and communications. ISO produced the OSI seven-layer model for network architecture. Its members are the national standards organizations of 89 countries, including the American National Standards Institute. The term **ISO** is not actually an acronym for anything. It is a pun on the Greek prefix iso-, meaning ‘same.’ Some ISO documents say ISO is not an acronym even though it is an anagram of the initials of the organization’s name.

Internet address — IP address, TCP/IP address. The 32-bit host address defined by the Internet Protocol in STD 5, RFC 791. It is usually represented in dotted decimal notation. A host’s Internet address is sometimes related to its Ethernet address. The Internet address is usually expressed in dot notation, such as 128.121.4.5. The address can be split into a network number (or network address) and a host number unique to each host on the network and sometimes also a subnet address. The way the address is split depends on its class, A, B or C as determined by the high address bits:

Class A - high bit 0, 7-bit network number, 24-bit host number n1.a.a.a 0 <- n1 <- 127

Class B - high 2 bits 10, 14-bit network number, 16-bit host number n1.n2.a.a 128 <- n1 <- 191

Class C - high 3 bits 110, 21-bit network number, 8-bit host number n1.n2.n3.a 192 <- n1 <- 223

The Internet address must be translated into an Ethernet address by either ARP or constant mapping. The term is sometimes used incorrectly to refer to a host’s fully qualified domain name.

Internetworking — The interconnection of two or more networks, usually local area networks so that data can pass between hosts on the different networks as though they were one network. This requires some kind of router or gateway.

Inter-packet gap — A time delay between successive data packets mandated by the network standard for protocol reasons. In Ethernet, the medium has to be ‘silent’ (that is, no data transfer) for a few microseconds before a node can consider the network idle and start to transmit. This is necessary for fairness reasons. The delay time, which approximately equals the signal propagation time on the cable, allows the “silence” to reach the far end so that all nodes consider the net idle.

Jitter — Instability in a signal wave; caused by signal interference or an unbalanced FDDI ring or Token Ring.

LAN — Local Area Network. A data communications network which is geographically limited (typically to a 1 km radius) allowing easy interconnection of computers within adjacent buildings. Ethernet and FDDI are examples of standard LANs. Because the network is known to cover only a small area, optimizations can be made in the network signal protocols that permit data rates up to 100 Mbps.

Lana — The NetBIOS LANA (LAN Adapter) number identifies the transport driver, network interface card (NIC) driver, and adapter that will be used to send and receive NetBIOS packets. Each transport driver (protocol), network interface card driver, and adapter will use a different lana number.

LLC — Logical Link Control. The lower sublayer of the data link layer. The interface between a node’s Logical Link Control and the network’s physical layer. The MAC differs for various physical media.

LMHOSTS — File that contains mappings between NetBIOS computer names and their IP addresses.

Latency — 1. The time it takes for a packet to cross a network connection, from sender to receiver. 2. The period of time that a frame is held by a network device before it is forwarded. Two of the most important parameters of a communications channel are its **latency** and **its bandwidth**.

MAC — The lower sublayer of the data link layer. The interface between a node’s Logical Link Control and the network’s physical layer. The MAC differs for various physical media.

MAN — Metropolitan Area Network. A data network intended to serve an area the size of a large city. Such networks are being implemented by innovative techniques, such as running optical fiber through subway tunnels.

Mbps — Megabits per second. Millions of bits per second. A unit of information transfer rate. For example, Ethernet can carry 10 Mbps.

Mesh — Commonly used in WAN configurations. Routers are connected to multiple links for redundancy and to give the ability to determine the quickest route to a destination.

Mnemonic — A shortened version of a command word, such as TXD for Transmit Data.

Multiplexer — Mux. Combines several separate data channels for transmission over a single line.

NDIS — Used to bind multiple protocols to a network adapter.

NIC — Network Interface Card. An adapter circuit board installed in a computer to provide a physical connection to a network.

NRZ — Non-Return to Zero

NWLINK — Microsoft version of IPX/SPX.

NetBEUI — NetBIOS Extended User Interface. The network transport protocol used by all of Microsoft's network systems and IBM's LAN Server based systems. NetBEUI is often confused with NetBIOS. NetBIOS is the applications programming interface and NetBEUI is the transport protocol.

NetBIOS — An application programming interface (API) which activates network operations on IBM PC compatibles running under MS-DOS. It is a set of network commands that the application program issues in order to transmit and receive data to another host on the network. The commands are interpreted by a network control program or network operating system that is NetBIOS compatible.

Name resolution — The process of mapping a name to its corresponding address. The Domain Name System is the system that does name resolution on the Internet.

Netmask — A 32-bit mask which shows how an Internet address is to be divided into network, subnet and host parts. The netmask has 1s in the bit positions in the 32-bit address which are to be used for the network and subnet parts, and zeros for the host part. The mask should contain at least the standard network portion (as determined by the address's class), and the subnet field should be contiguous with the network portion.

Network — Hardware and software data communication systems. The OSI seven layer model attempts to provide a way of partitioning any computer network into independent modules from the lowest (physical) layer to the highest (application) layer. Many different specifications exist at each of these layers. Networks are often also classified according to their geographical extent: local area network (LAN), metropolitan area network (MAN), wide area network (WAN) and also according to the protocols used.

Network Address — The network portion of an IP address. For a class A network, the network address is the first byte of the IP address. For a class B network, the network address is the first two bytes of the IP address. For a class C network, the network address is the first three bytes of the IP address. In each case, the remainder is the host address. In the Internet, assigned network addresses are globally unique.

Network card — See NIC.

Network Layer — The third lowest layer in the OSI seven layer model. The network layer determines routing of packets of data from sender to receiver via the data link layer and is used by the transport layer. The most common network layer protocol is IP.

Network Transparency — A feature of an operating system or other service which lets the user access a remote resource through a network without having to know if the resource is remote or local.

Node — An addressable device attached to a computer network. More often called a host.

Null Modem — A cable, especially an RS-232 cable, for connecting serial ports on two computers directly, rather than via modems. Since, according to the specification, both computers should transmit on pin three of their RS-232 connectors and receive on pin two, a null modem cable needs to connect one computer's pin two to the other's pin three and vice versa. It also needs to have male connectors at both ends (again, according to the specification).

OSI — Open Systems Interconnection model. A model of network architecture and a suite of protocols (a protocol stack) to implement it, developed by ISO in 1978 as a framework for international standards in heterogeneous computer network architecture. The OSI architecture is split between seven layers, from lowest to highest: 1 physical layer, 2 data link layer, 3 network layer, 4 transport layer, 5 session layer, 6 presentation layer, 7 application layer.

OSPF — Open shortest path first (routing algorithm)

Optical fiber — A plastic or glass (silicon dioxide) fiber no thicker than a human hair used to transmit information using infrared or even visible light as the carrier (usually a laser). The light beam is an electromagnetic signal with a frequency in the range of 10^{14} to 10^{15} Hertz. Optical fiber is less susceptible to external noise than other transmission media, and is cheaper to make than copper wire, but it is much more difficult to connect. Optical fibers are difficult to tamper with (to monitor or inject data in the middle of a connection), making them appropriate for secure communications. The light beams do not escape from the medium because the material used provides total internal reflection.

AT&T Bell Laboratories in the United States managed to send information at a rate of 420 Mbps, over 161.5 km through an optical fiber cable. In Japan, 445.Mbps was achieved over a shorter distance. At this rate, the entire text of the Encyclopedia Britannica could be transmitted in one second. Currently, AT&T is working on a world network to support high volume data transmission, international computer networking, electronic mail and voice communications. (A single fiber can transmit 200 million telephone conversations simultaneously.)

PCMCIA — Personal Computer Memory Card International Association

PDC — Primary Domain Controller. Logins, permissions, scripts, securities.

PVC — Permanent virtual circuit

Packet — The unit of data sent across a network. Packet is a generic term used to describe a unit of data at any layer of the OSI protocol stack, but it is most correctly used to describe application layer data units

Packet Switching — A communications paradigm in which packets (messages or fragments of messages) are individually routed between nodes, with no previously established communication path. Packets are routed to their destination through the most expedient route (as determined by some routing algorithm). Not all packets travelling between the same two hosts, even those from a single message, will necessarily follow the same route. The destination computer reassembles the packets into their appropriate sequence. Packet switching is used to optimize the use of the bandwidth available in a network and to minimize the latency.

Peer — A unit of communications hardware or software that is on the same protocol layer of a network as another. A common way of viewing a communications link is as two protocol stacks, which are actually connected only at the very lowest (physical) layer, but can be regarded as being connected at each higher layer by virtue of the services provided by the lower layers. Peer-to-peer communication refers to these real or virtual connections between corresponding systems in each layer.

Peer-to-Peer Networks — No dedicated server or hierarchy, also called a workgroup. Usually ten or fewer workstations. Users act as their own administrator and security. Computers are in same general area. Limited growth.

Parallel — Transmission mode that sends a number of bits concurrently over separate wires.

Path — The list of directories the command interpreter searches for executables. It is stored as part of the environment in the operating system.

Physical addressing — The low level addressing scheme used on Ethernet. The 48-bit destination Ethernet address in a packet is compared with the receiving node's Ethernet address.

Physical Layer — The lowest layer in the OSI seven layer model. It concerns electrical and mechanical connections and MAC. It is used by the data link layer. Example physical layer protocols are CSMA/CD, token ring and bus.

Presentation Layer — The second highest layer (layer 6) in the OSI seven layer model. Performs functions such as text compression, code or format conversion to try to smooth out differences between hosts. Allows incompatible processes in the application layer to communicate via the session layer.

Protocol — A set of formal rules describing how to transmit data, especially across a network. Low level protocols define the electrical and physical standards to be observed, bit- and byte-ordering and the transmission and error detection and correction of the bit stream. High level protocols deal with the data formatting, including the syntax of messages, the terminal to computer dialogue, character sets, sequencing of messages and so on.

Protocol stack — A layered set of protocols which work together to provide a set of network functions. Each intermediate protocol layer uses the layer below it to provide a service to the layer above. The OSI seven layer model is an attempt to provide a standard framework within which to describe protocol stacks.

Protocol Layer — The software and/or hardware environment of two or more communications devices or computers in which a particular network protocol operates. A network connection may be thought of as a set of more or less independent protocols, each in a different layer or level. The lowest layer governs direct host-to-host communication between the hardware at different hosts; the highest consists of user application programs. Each layer uses the layer beneath it and provides a service for the layer above.

Each networking component hardware or software on one host uses protocol appropriate to its layer to communicate with the corresponding component (its peer) on another host. Such layered protocols are sometimes known as

peer-to-peer protocols. The advantages of layered protocols is that the methods of passing information from one layer to another are specified clearly as part of the protocol suite, and changes within a protocol layer are prevented from affecting the other layers. This greatly simplifies the task of designing and maintaining communication systems. Examples of layered protocols are TCP/IP's five layer protocol stack and the OSI seven layer model.

Protocol Analyzer — Sniffer. Monitors and logs network activities and provides guidelines for optimizing.

RD — Receive Data

RI — Ring Indicator

RIP — Routing information protocol. Uses distance-vector algorithms to determine routes.

RJ11 — Modular Telephone Jack Standard-11. A six conductor modular jack that is typically wired for four conductors. One line with the two center, red and green, conductors being tip and ring.

RJ14 — Modular Telephone Jack Standard-14. Consists of two phone lines. One of the lines is the RJ11 line (the red and green conductors in the center). The second line is the second set of conductors, black and yellow, on the outside.

RJ45 — Modular Telephone Jack Standard-45. The eight-pin connector used for data transmission over standard telephone wire.

RJ48C — Modular telephone Jack Standard-48C. An eight-position keyed plug with four wires, two for transmit, two for receive. Commonly used in T1 transmission.

RS232 — EIA Recommended Standard-232. Standards specifying electrical and mechanical characteristics for interfaces between computer devices.

RS449 — EIA DB37 and DB9 interlace for DTE and DCE data interchange.

RTS — Request to Send

Reassembly — Joining back together a previously fragmented IP packet before it is passed to the transport layer. See also **Fragmentation**.

Redirector — All Microsoft products come with a redirector that takes a request from the computer and looks to see if it is local or sends to network.

Registry — A central database, where all hardware details, software settings and user preferences are stored.

Reliable communication — Communication where messages are guaranteed to reach their destination complete and uncorrupted and in the order they were sent. This reliability can be built on top of an unreliable protocol by adding sequencing information and some kind of checksum or cyclic redundancy check to each message or packet. If the communication fails, the sender will be notified. Transmission Control Protocol is a reliable protocol used on Ethernet.

Repeater — A part of an Ethernet or other network, on which all message traffic is common to all nodes, that is, it is broadcast from one node on the segment and received by all others. This is normally because the segment is a single continuous conductor, though it may include repeaters. Since all nodes share the physical medium, collision detection or some other protocol is required to determine whether a message was transmitted without interference from other nodes. The receiving node inspects the destination address of a packet to tell if it was (one of) the intended recipient(s). Communication between nodes on different segments is via one or more routers.

Ring Topology — Computers are connected on a single circle of cable. Each computer acts as a repeater. Failure of one computer can affect the entire network. Token passing is used in Token Ring networks. The token is passed from one computer to the next, only the computer with the token can transmit. The receiving computer strips the data from the token and sends the token back to the sending computer with an acknowledgment. After verification, the token is regenerated.

Router — A device which forwards packets between networks. The forwarding decision is based on network layer information and routing tables, often constructed by routing protocols.

Routing — The process, performed by a router, of selecting the correct interface and next hop for a packet being forwarded

SMDS — Switched multi-megabit data service. Up to 34 Mbps. Same fixed-length, cell-relay technology as ATM.

SONET — Synchronous Optical Network. Fiber-optic cabling. 1 Gig per second.

SQL — Structured Query Language. Used by most databases to manipulate data.

STP — Shielded Twisted Pair. Twisted pair wiring, carries signal 100 meters. Has foil or braided jacket around wiring to help reduce crosstalk and to prevent electromagnetic interference.

SVC — Switched virtual circuit

Segment — A part of an Ethernet or other network, on which all message traffic is common to all nodes, that is, it is broadcast from one node on the segment and received by all others. This is normally because the segment is a single continuous conductor, though it may include repeaters. Since all nodes share the physical medium, collision detection or some other protocol is required to determine whether a message was transmitted without interference from other nodes. The receiving node inspects the destination address of a packet to tell if it was (one of) the intended recipient(s). Communication between nodes on different segments is via one or more routers.

Serial (Port) — A connector on a computer to which you can attach a serial line connected to peripherals which communicate using a serial (bit-stream) protocol. The most common type of serial port is a 25-pin D-type connector carrying RS-232 signals. Smaller connectors (e.g. 9-pin D-type) carrying a subset of RS-232 are often used on personal computers. The serial port is usually connected to an integrated circuit called a UART which handles the conversion between serial and parallel data.

Server — A computer that provides some service for other computers connected to it via a network.

Server Based Networks — Ten or more users. Employs specialized servers. File and Print, Application, Mail, Fax, Communications (gateways), Central administration, Greater security, Centralized backup, Data Redundancy. Supports many users.

Session — A lasting connection between a user (or user agent) and a peer, typically a server, usually involving the exchange of many packets between the user's computer and the server. A session is typically implemented as a layer in a network protocol (such as Telnet or FTP).

Session Layer — The third highest protocol layer (layer 5) in the OSI seven-layer model. The session layer uses the transport layer to establish a connection between processes on different hosts. It handles security and creation of the session. It is used by the presentation layer.

Share-level security — Used in Microsoft® Windows® 95 to share resources. A password is needed to access the resource.

Sniffer — A network monitoring tool that can capture data packets and decode them to show protocol data.

Star Bus Topology — Several star topologies linked with a linear bus.

Star Ring Topology — Star hubs are connected using ring topology as opposed to a linear bus or a central hub.

Star Topology — Computers are connected by cable segments to a centralized hub. Signal travels through the hub to all other computers. Requires more cable. If hub goes down, entire network goes down. If a computer goes down, the network functions normally.

Static Router — Administrator manually sets up and configures routing table.

Subnet — A portion of a network, which may be a physically independent network segment, that shares a network address with other portions of the network and is distinguished by a subnet number. A subnet is to a network what a network is to an internet.

Subnet Address — The subnet portion of an IP address. In a subnetted network, the host portion of an IP address is split into a subnet portion and a host portion using an address mask (the subnet mask).

Subnet mask — See **Address Mask**.

Synchronous Transmission — Transmission in which data bits are sent at a fixed rate, with transmitter and receiver synchronized. Data going in both directions; expensive.

T1 — 1.544 Mbps. Point-to-point, full-duplex transmission. Voice, data and video.

T3 — 45 Mbps. Point-to-point, full-duplex transmission. Voice, data and video.

TCP — Transmission Control Protocol. The most common transport layer protocol used on Ethernet and the Internet. It was developed by DARPA. TCP is built on top of Internet Protocol (IP) and is nearly always seen in the combination TCP/IP (TCP over IP). It adds reliable communication, flow-control, multiplexing and connection-oriented communication. It provides full-duplex, process-to-process connections.

TCP/IP — Transmission Control Protocol/Internet Protocol. The de facto standard Ethernet protocols incorporated into 4.2BSD UNIX. TCP/IP was developed by DARPA for internetworking and encompasses both network layer and transport layer protocols. While TCP and IP specify two protocols at specific protocol layers, TCP/IP is often used to refer to the entire DoD protocol suite based upon these, including Telnet, FTP, UDP and RDP.

TD — Transmit Data

TDR — Time Domain Reflectometer. Sends pulses down cable. Looks for shorts or opens. Can give you area of problem.

TERMSTR — Pronounced “term-stir”. An environment setting used to override the default naming convention for terminals that must be used on all Aloha terminals and file servers. For example, if TERMSTR is set to TERM, then terminals must be named TERM1, TERM2, etc. Etymology: derived from old Cuban slang term for a traumatized hamster.

Thinnet — 10Base2. 185 meters (607 feet); 10 Mbps; BNC Connector (barrel connector, terminator); RG58 cable. 5-4-3 rule (5 segments with 4 repeaters but only 3 segments can have computers.)

Thicknet — Also known as **Standard Ethernet** (10base5). 500 meters (1640 feet); 10 Mbps; AUI (attachment unit interface) connector, transceivers, transceiver cables (connect to thin).

Top-level domain — The last and most significant component of an Internet fully qualified domain name, the part after the last “.”. For example, host wombat.doc.ic.ac.uk is in top-level domain **uk** (for United Kingdom).

Topology — Refers to the configuration of the physical media of a network.

Transport Layer — Host-host layer. The middle layer in the OSI seven-layer model. The transport layer determines how to use the network layer to provide a virtual error-free, point to point connection so that host A can send messages to host B and they will arrive uncorrupted and in the correct order. It establishes and dissolves connections between hosts. It is used by the session layer. An example transport layer protocol is Transmission Control Protocol (TCP).

Transport Protocol — Ensures error-free transmission.

Twisted Pair — Standard phone line made up of two insulated copper wires wrapped around each other. The twists minimize interference and attenuation.

UNC — Uniform (or Universal) Naming Convention. Used in IBM PC networking to completely specify a directory on a file server. The basic format is: \\servername\sharename, where **servername** is the hostname of a network file server, and **sharename** is the name of a networked or shared directory. Note this is not the same as the conventional MS-DOS C:\WINDOWS directory name, such as: \\server1\dave, which might be set up to point to: C:\users\homedirs\dave on a server called **server1**. It is possible to execute a program using this convention without having to specifically link a drive, by running: \\server\share\directory\program.exe

The undocumented MS-DOS command, TRUENAME can be used to find out the UNC name of a file or directory on a network drive.

UPS — Uninterruptible Power Supply. Power supply to run a computer for a short time in case of power loss.

UTP — Unshielded Twisted Pair. At least two pairs of insulated twisted pair and wrapped in an outer cover.

User-level security — Used in Windows NT® to share resources. When you attempt to access a shared resource, the server will make sure your user account has been authorized to access the resource.

Virtual Circuits — Logical connections between sending and receiving computers.

WAN — Wide Area Network. At least two LANs or MANs connected over a great distance, sometimes even intercontinentally.

WINS — Windows Internet Naming Service. Used to resolve a NetBIOS computer name to an IP address. WINS supports network client and server computers running Windows and can provide name resolution for other computers with special arrangements.

Workgroup — A group of users in a multi-user environment who share data.

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